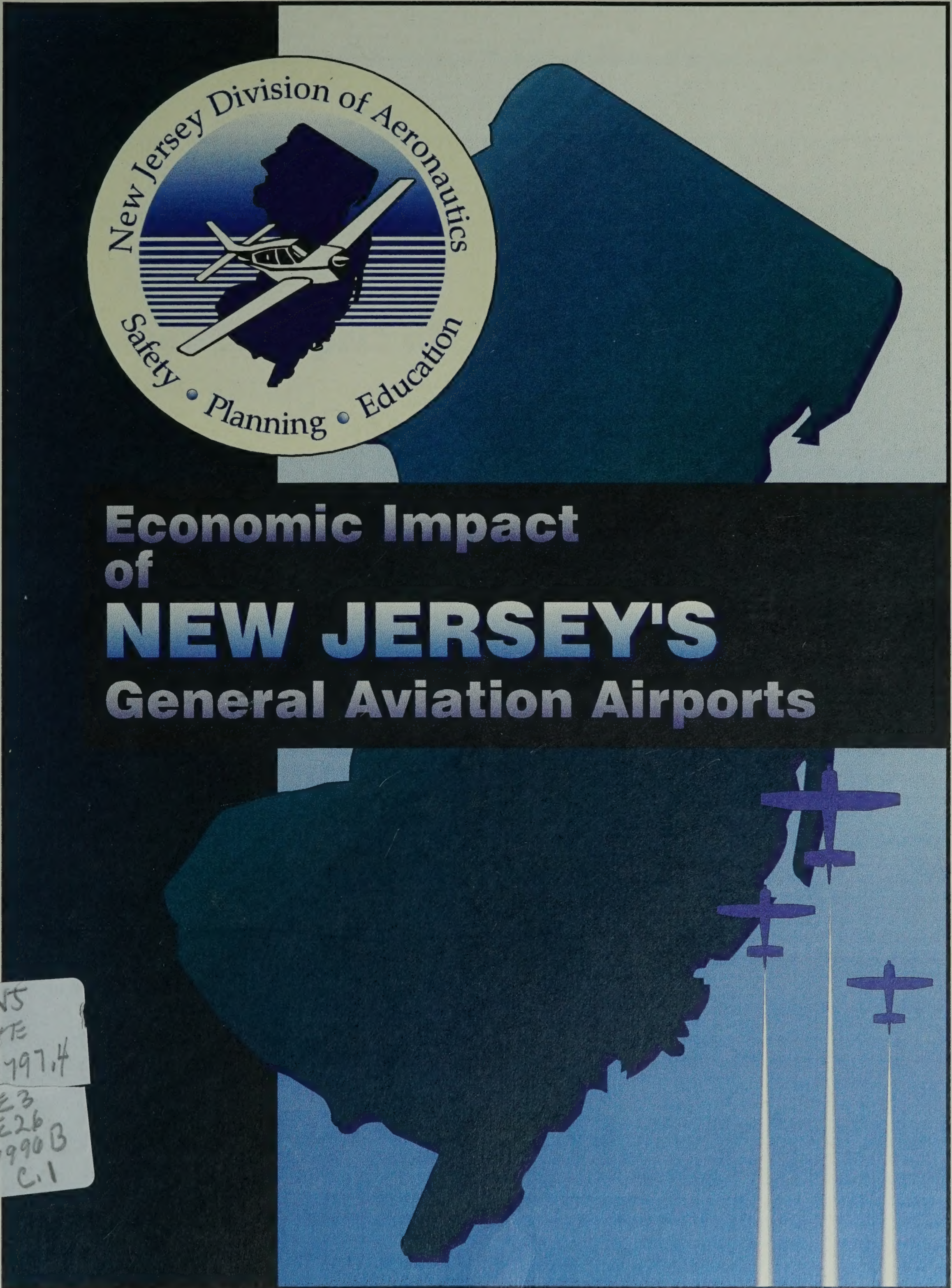
New Jersey Division of Aeronautics

Safety • Planning • Education

Economic Impact of NEW JERSEY'S General Aviation Airports



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Technical Report

Economic Impact of General Aviation in New Jersey

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ECONOMIC IMPACT OF GENERAL AVIATION IN NEW JERSEY

Airports and aviation are essential elements of the United States economy and transportation system. They provide a quick, efficient, and safe method to move people and goods, and they improve the quality of life of every citizen. As necessary as the network of airports is to the national welfare, so too are airports to the economy of the State of New Jersey. These facilities provide an integral link to the rest of the country and the world, as well as serving as a source of transportation and economic stimulus within New Jersey.

The air transportation system consists of a network of local, regional, and national airports. The system feeds local traffic into regional airports and regional airports into national airports. This report focuses on New Jersey's network of general aviation airports (non-military, non-airline) and their significant contribution to the growth and economic prosperity of the State.

New Jersey has one of the most complex aviation environments in the U.S. Among all states, New Jersey ranks ninth in terms of its total population but it ranks second in terms of population per square mile. With almost 5,000 general aviation aircraft in the State, New Jersey ranks second among all states in terms of general aviation aircraft per square mile. Conversely, in terms of the number of airports available to serve each 100,000 persons in the State, New Jersey ranks last among all states. This fact helps to emphasize the extreme value and importance of the limited number of general aviation airports that are available to meet the State's air transportation needs and the urgency to maintain this system.

There are 48 general aviation airports that are open to public use in the State. Further development of New Jersey's general aviation airport system is constrained by several factors including the nation's most complicated and constrained airspace environment. Intense competition for land within the State further limits the State's ability to bring new airport facilities on-line. Development competition within the State threatens many of the general aviation airports that are open to public use. In most state airport systems, ownership of the public-use general aviation airports rests with a public entity such as a city, county, or transportation authority. Within New Jersey, however, over two thirds of the general aviation airports that are open to the public are privately owned. These privately-owned airports have a higher propensity to succumb to development pressures; and in fact, numerous privately-owned general aviation airports in New Jersey have been sold and converted to non-aviation uses in recent years.

A healthy and efficient system of airports is important to the economies of the nation, the region, the State, and local municipalities. Through their employees and their tenants and the visitors they bring to the State, New Jersey's system of general aviation airports is a major economic contributor. Not only do the airports themselves generate economic benefits but many other non-aviation employers who rely on the general aviation airport system to support their daily business activities also contribute to building the State's economy. This reliance can be estimated and expressed as additional "value-added" benefits stemming from the operation and use of New Jersey's general aviation airport system.

To more fully understand the relationship between New Jersey's general aviation airports and the statewide economy, an economic impact analysis was undertaken by the New Jersey Division of Aeronautics. This report summarizes the analysis and highlights the significant economic value of New Jersey's system of general aviation airports.

This study corroborates that many people, beyond the immediate environs of each airport, derive economic benefit from the daily operation of the airport system. These groups include the employees of businesses and corporations who base corporate aircraft at New Jersey airports; the commercial and industrial employers whose shipments arrive or depart via the airports; the area retail establishments who provide shopping opportunities for visitors arriving by air; and the hotels, restaurants, and tourist-related activities whose patrons arrive at the local general aviation facilities. Almost every economic sector in New Jersey, even those that never directly use an airport or its many services, receives some economic benefit from the general aviation airports.

For this study, data for the economic benefits analysis were collected via on-site visits and additional survey efforts. Members of the consulting team visited each system airport on at least two occasions. These visits focused on identifying and categorizing on-site aviation-related employment; setting up a survey for visitors arriving at each airport; and noting the more qualitative health, welfare, and safety-related benefits associated with each airport.

These on-site visits were supplemented by a variety of survey efforts. One of the primary data sources for this analysis was the various tenants located at the individual airports throughout the State. Information on employment, payroll, and capital expenditures was collected from each tenant via mail surveys and telephone interviews. A survey was also mailed to over 1,700 owners of general aviation aircraft who reside in New Jersey. This survey was designed to gather specific data on aircraft owners who use their aircraft for business purposes and to identify which airports are used most frequently for business-related activities. Over 5,000 surveys were distributed to fixed base operators (FBOs) throughout the State. An FBO is an airport tenant who provides services such as fueling, aircraft storage, and aircraft and avionics repair. With the assistance of the FBOs, these surveys were distributed to visitors who arrived in the State via general aviation aircraft during the May-June 1995 survey period. Finally, a mail survey of 5,000 employers in New Jersey was completed to determine the dependence of these businesses on the State's general aviation airport system. The results of this business survey were used to estimate "value-added" employment as it relates to New Jersey's general aviation airports.

Through quantitative modeling efforts, estimates of the impacts occurring as a result of on-airport activities (fixed base operators, flight schools, corporate flight departments, government, and various other businesses), as well as the expenditures of visitors who arrive using general aviation aircraft can be made. These on-airport impacts and visitor expenditures provide a wider community economic impact which can be measured using sector-specific employment, payroll, and output multipliers. Quantifying an airport's contribution to the State's economy, as it relates to overall business growth and development, is less precise. When the benefit of the general aviation airport system to the State is reviewed, these less tangible economic contributions must also be considered.

Results of the analysis showed, on both a direct and a secondary basis, that tenants and visitors who arrive via the general aviation airport system support almost 16,000 jobs in the State. These jobs have an estimated annual payroll of $450 million. On an annual basis, New Jersey general aviation airports directly pump over $1.3 billion into the State's economy. There are over 40 other non-aviation businesses located on various general aviation airports, and these businesses employ another estimated 1,300 persons. Many employers in New Jersey rely on the general aviation airports to conduct their business activities. Having access to general aviation airports increases business productivity and efficiency. Results of the business survey show there are approximately 54,700 additional value-added jobs in New Jersey that in some way rely on, or that benefit from, the general aviation airport system. Over 70,500 total jobs in the State of New Jersey are related to the daily operation of the State's general aviation airport system. Annual economic activity associated with the general aviation airports themselves, when coupled with the businesses who depend on them exceeds $4.6 billion.

While this study focused on the benefits of the general aviation airport system, many additional benefits result from the day-to-day operation of New Jersey's two primary air carrier airports, Newark International and Atlantic City International. Using annual enplanement levels for these airports and industry standards for total annual economic output per enplanement, tenants at and visitors who arrive via these two airports are most likely responsible for another $8.6 billion in annual economic activity. This estimate does not include the value-added benefit of the State's commercial service airports, which is of course extensive. It is likely that over 400,000 additional value-added jobs exist because of the operation of New Jersey's two primary air carrier airports. It is important to note, however, that as a result of Newark International's proximity to the New York metropolitan area, that some portion of the airport's benefits are accrued by the State of New York. When all air carrier and general aviation benefits are totaled, it is possible that annual economic activity approaching $36 billion can be traced to New Jersey's airport system.

In addition to these economic benefits, New Jersey's general aviation airport system also provides numerous health, welfare, and social benefits. Important daily activities such as air care flights, police, fire support, agricultural and environmental management, traffic reporting, and search and rescue operations are supported by the system of general aviation airports. These qualitative benefits are discussed for each of the study airports.

This study's analysis also quantified the specific economic benefits derived from 36 of New Jersey's general aviation airports. **Exhibit 1** depicts the location of all of New Jersey's public use airports and highlights the primary airports included in the individual analysis. Impacts stemming from

Air Carrier[1]

1 Atlantic City International
2 Newark International
34 Trenton Mercer

General Aviation Airports

Primary

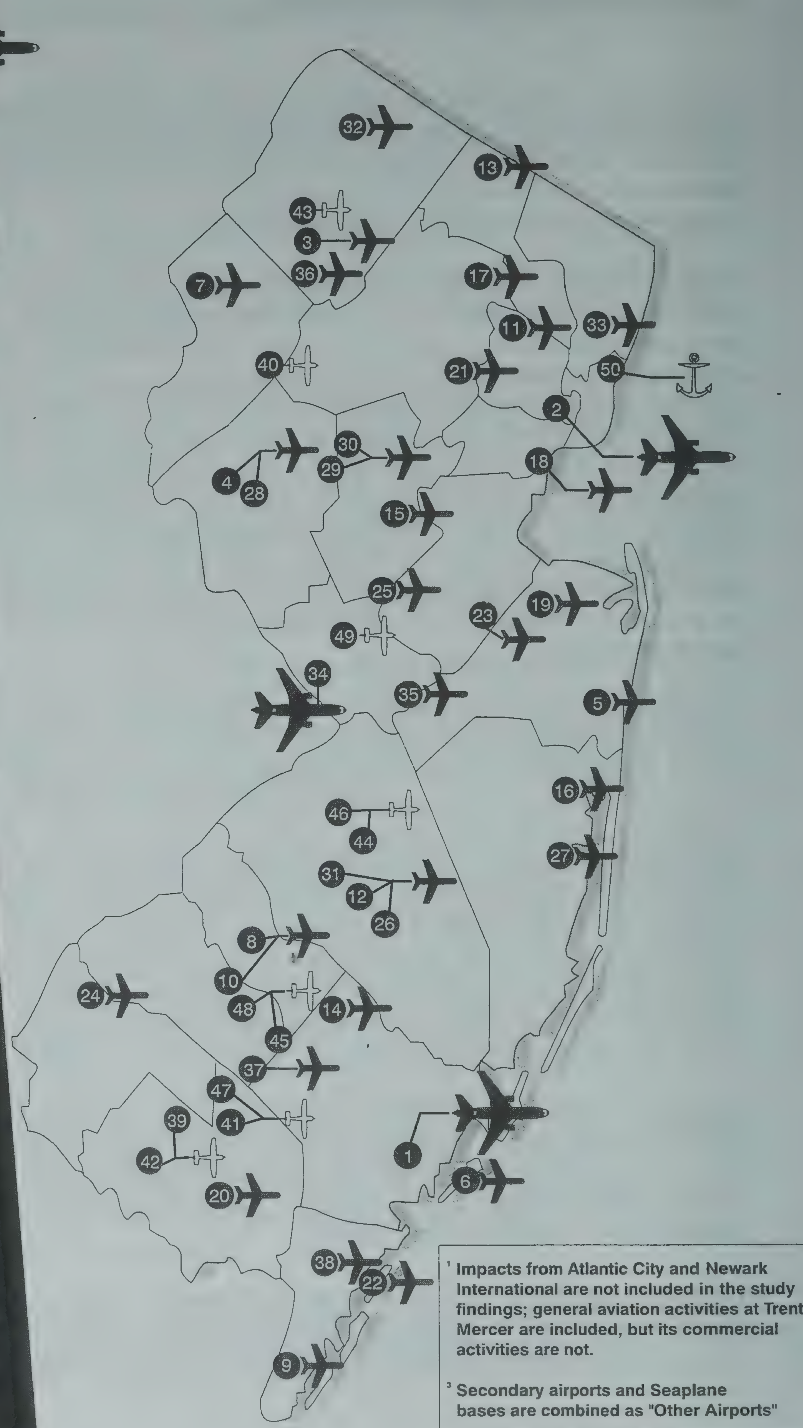
3 Aeroflex- Andover
4 Alexandria Field
5 Allaire
6 Atlantic City Municipal-Bader Field
7 Blairstown
8 Camden County
9 Cape May County
10 Cross Keys
11 Essex County
12 Flying W
13 Greenwood Lake
14 Hammonton Municipal
15 Kupper
16 Lakewood
17 Lincoln Park
18 Linden
19 Marlboro
20 Millville Municipal
21 Morristown Municipal
22 Ocean City Municipal
23 Old Bridge
24 Oldmans
25 Princeton
26 Red Lion
27 R.J. Miller Airpark
28 Sky Manor
29 Solberg- Hunterdon
30 Somerset
31 South Jersey Regional
32 Sussex
33 Teterboro
34 Trenton Mercer
35 Trenton- Robbinsville
36 Trinca
37 Vineland- Downstown
38 Woodbine Municipal

Secondary[2]

39 Bucks
40 Hackettstown
41 Kroelinger
42 LiCalzi
43 Newton
44 Pemberton
45 Piney Hollow Airfield
46 Red Wing
47 Rudy's
48 Southern Cross
49 Twin Pines

Seaplane Bases[2]

50 Little Ferry



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[1] Impacts from Atlantic City and Newark International are not included in the study findings; general aviation activities at Trenton Mercer are included, but its commercial activities are not.

[3] Secondary airports and Seaplane bases are combined as "Other Airports"

Airport Locations

Exhibit 1

secondary general aviation airports were also estimated in general terms in an "Other Airports" category. Using surveys, airport visits, as well as accepted economic impact modeling procedures, this airport-specific analysis quantifies economic impacts by estimating the benefits associated with on-airport tenants, visitors using general aviation travel, and New Jersey businesses who rely on the airport system. This process produces estimates of expenditures, payroll, and employment that are attributable to the New Jersey system of general aviation airports.

The data contained in this analysis are based on 1994 estimated airport activity and spending levels; it is likely that the economic link between New Jersey's airports and the State's economy will grow as the number of visitors, operations, and based aircraft at New Jersey's general aviation airports increases.

The economic impact analysis is documented as follows:

- Demographic Trends
- Methodology
- Statewide Economic Impact of General Aviation
- Qualitative Airport Benefits
- Business Use of New Jersey Airports
- Economic Impact by Airport

1. DEMOGRAPHIC TRENDS

New Jersey is one of the most industrialized states in the nation, although tourism and agriculture also play an important role in the State's economy. New Jersey manufactures a greater variety of commodities than any other state. Pharmaceuticals, chemicals, machinery, transportation equipment, primary and fabricated metal goods, rubber products, textiles and clothing, foodstuffs, leather, and refined oil are produced in staggering quantities.

The northeastern portion of the State which includes Essex, Bergen, Union, and Hudson Counties, adjacent to New York City, contains the greatest industrial concentration. A secondary industrial area lies south of Trenton in Camden County near Philadelphia. During the 1970's, high-tech and service industries began replacing New Jersey's traditional "smokestack" industries.

Tourism remains a growing industry in the State. The attraction of the casinos, convention center, and the boardwalk of Atlantic City draws tourists from all over the United States. The Jersey shore attracts vacationers to resort communities from Sandy Hook to Cape May. The many national wildlife refuges on the coast attract campers and bird watchers from all over. The convenience of the Meadowlands Sport Complex in the north is a great sports and concert-goers attraction. Within the State, there are many other cultural, entertainment, and educational features which strengthen the economy as it relates to tourism.

A. Population

As one of the most densely populated states in the U.S., New Jersey has intense competition for developable land. This has impacted the State's system of airports over the last 15 to 20 years via residential encroachment and, in some instances, airport closures. With an estimated 1994 population of 7.9 million, New Jersey has experienced moderate population growth since 1980. The average annual growth rate for the State's population was less than one percent between 1980 and 1994; a total increase in population of 539,089 was experienced between 1980 and 1994. **Table 1** identifies the population trends for the State and each county.

While the entire State has experienced an overall increase in population, demographic trends vary by county. Areas experiencing growth are generally located along expressway corridors within the State. Areas experiencing a population decline, as a result of out-migration, are the most densely populated counties nearest to the New York City metropolitan area.

Bergen County, according to U.S. Census Data, was the most populous county in the State in 1994 with 842,400 people. Salem County, located in the southwest portion of the State, is the least urbanized county with a population of 65,294. Essex County, with a population of 765,400 people, experienced a population loss of 35,904 from 1980 to 1994. This was the largest decline among counties in the State and the sixth largest decline of any county in the country. A great deal of this population reduction has been attributed to a migration of residents out of Newark, the State's largest city. Eighteen percent of its population moved from Newark between 1980 and 1994. Hudson County is ranked sixth nationally and first in the State for population per square mile with 6,123 people per square mile; this county is also experiencing out-migration.

Two of the fastest growing counties in the State are Ocean and Hunterdon Counties. In the last four decades, Ocean County has led the State in population growth. Between 1980 and 1990, this County grew by over 25 percent, adding 87,165 new residents. Most of these new residents are a result of in-migration from the northern portion of New Jersey. Hunterdon County, located in the west-central portion of the State, has also experienced a relatively rapid population growth. The bulk of this growth has resulted from in-migration spurred by the County's increased accessibility, affordable land, and rural character desired by new residents.

B. Employment

In 1994, the total number of people employed in New Jersey was 3.7 million. The largest employer, the service industry, accounts for approximately 976,500 employees. **Table 2** identifies the number of employees and the average annual wage for each industry sector. The government, services, and manufacturing industries each have over a half million

TABLE 1

Economic Impact of General Aviation in New Jersey

NEW JERSEY POPULATION TRENDS 1980 TO 1994

		Population			
County	1980	1990	1994 /1	1980 to 1990 Average Annual Growth Rate	1990 to 1994 Average Annual Growth Rate
Atlantic	194,119	224,327	232,200	1.56%	0.88%
Bergen	845,385	825,380	842,400	-0.24%	0.52%
Burlington	362,542	395,066	398,800	0.90%	0.24%
Camden	471,650	502,824	506,600	0.66%	0.19%
Cape May	82,266	95,089	97,800	1.56%	0.71%
Cumberland	132,866	138,053	138,800	0.39%	0.14%
Essex	851,304	778,206	765,400	-0.86%	-0.41%
Gloucester	199,917	230,082	241,500	1.51%	1.24%
Hudson	556,972	553,099	552,400	-0.07%	-0.03%
Hunterdon	87,361	107,776	115,200	2.34%	1.72%
Mercer	307,863	325,824	329,400	0.58%	0.27%
Middlesex	595,893	671,780	692,900	1.27%	0.79%
Monmouth	503,173	553,124	578,500	1.00%	1.15%
Morris	407,630	421,353	438,500	0.34%	1.02%
Ocean	346,038	433,203	456,500	2.52%	1.34%
Passaic	447,585	453,060	461,800	0.12%	0.48%
Salem	64,676	65,294	64,800	0.10%	-0.19%
Somerset	203,129	240,279	260,700	1.83%	2.12%
Sussex	116,119	130,943	138,300	1.28%	1.40%
Union	504,094	493,819	496,200	-0.20%	0.12%
Warren	84,429	91,607	95,400	0.85%	1.04%
TOTAL	**7,365,011**	**7,730,188**	**7,904,100**	**0.50%**	**0.56%**

1/ estimates based on 1990 census data.

Source: New Jersey State Data Center

01/22/96

TABLE 2

Economic Impact of General Aviation in New Jersey

NEW JERSEY EMPLOYMENT 1994

Industry Sector	Average Annual Employment	1994 Average Annual Wages
Agriculture , Forestry, and Fisheries	27,225	$19,700
Mining	2,061	$42,300
Construction	129,400	$36,300
Manufacturing	544,932	$40,100
Transportation	156,733	$31,200
Communications and Utilities	98,595	$54,900
Wholesale Trade	274,961	$42,300
Retail Trade	605,022	$17,300
Finance, Insurance and Real Estate	243,072	$44,500
Service	1,059,168	$30,500
Government	578,231	$35,300
TOTAL	**3,719,400**	**$35,855**

Source: N.J. Department of Labor, Bureau of Labor Force Statistics 01/22/96 employees. The industry with the highest average wages, ($54,900), is transportation, communications, and utilities. Employees in retail trade experience the lowest average wages. The 1994 average wage for all employment sectors in New Jersey was approximately $35,900.

C. Income

Table 3 identifies the median income by county in the State. Morris County registered a median household income of $56,273, the highest in the State and the second highest in the nation behind Fairfax County, Virginia. Somerset, with a $55,519 median household income, ranked second in New Jersey and third nationally; while Hunterdon placed third in the State and fifth nationally with a median income of $54,628. On the other end of the scale, Cumberland County had the lowest median income in New Jersey at $29,985 followed by Hudson County with a median income of $30,917.

2. METHODOLOGY

As noted, general aviation is an important factor influencing the economic growth and development of New Jersey. This economic impact study quantifies the economic impact, or contribution, of each general aviation airport in the State's system. Employment, payroll, and output (equated with spending) impacts generated by two aviation-dependent groups were measured as part of this study. These aviation-dependent groups are:

- On-airport tenants
- Visitors traveling via general aviation aircraft

These two groups are responsible for a notable percentage of the economic impacts, or benefits, associated with New Jersey's system of general aviation airports. In addition to these on-airport impacts, the study also identified the importance of aviation to employers through a survey of more than 5,000 businesses located in New Jersey. These business-related impacts are estimated and discussed in a later section of this analysis. The qualitative health, welfare, and social benefits of the State's general aviation airports were also identified as part of this study's survey process.

This section is organized in two separate subsections, as follows:

- Input-Output Methodology
- Economic Impacts

A. Input-Output Methodology

The economic impact (also referred to as economic benefit) of New Jersey's general aviation airports was quantified using an input-output modeling process. To assess the economic

TABLE 3

Economic Impact of General Aviation in New Jersey

NEW JERSEY HOUSEHOLD INCOME 1990

County	Median Income	New Jersey Rank
Atlantic	$33,716	16
Bergen	$49,249	4
Burlington	$42,373	8
Camden	$36,190	14
Cape May	$30,435	20
Cumberland	$29,985	21
Essex	$34,518	15
Gloucester	$39,387	12
Hudson	$30,917	19
Hunterdon	$54,628	3
Mercer	$41,227	10
Middlesex	$45,623	7
Monmouth	$45,912	6
Morris	$56,273	1
Ocean	$33,110	18
Passaic	$37,596	13
Salem	$33,155	17
Somerset	$55,519	2
Sussex	$48,823	5
Union	$41,791	9
Warren	$39,929	11

Source: 1990 Census

benefit of the tenants and general aviation visitors at the study airports, three segments of economic impact were calculated:

- Direct Impacts - Direct impacts or benefits are defined as economic activity that occurs as a result of an airport. These benefits include all the tenants located on an airport (FBOs, aircraft maintenance, flight schools, government/management, etc.). For simplicity in discussing impacts in this analysis, impacts resulting from visitor expenditures are also included in the direct impact category. All direct impacts associated with individual airports are identified through survey efforts. These direct benefits are also referred to as first round impacts in this study.

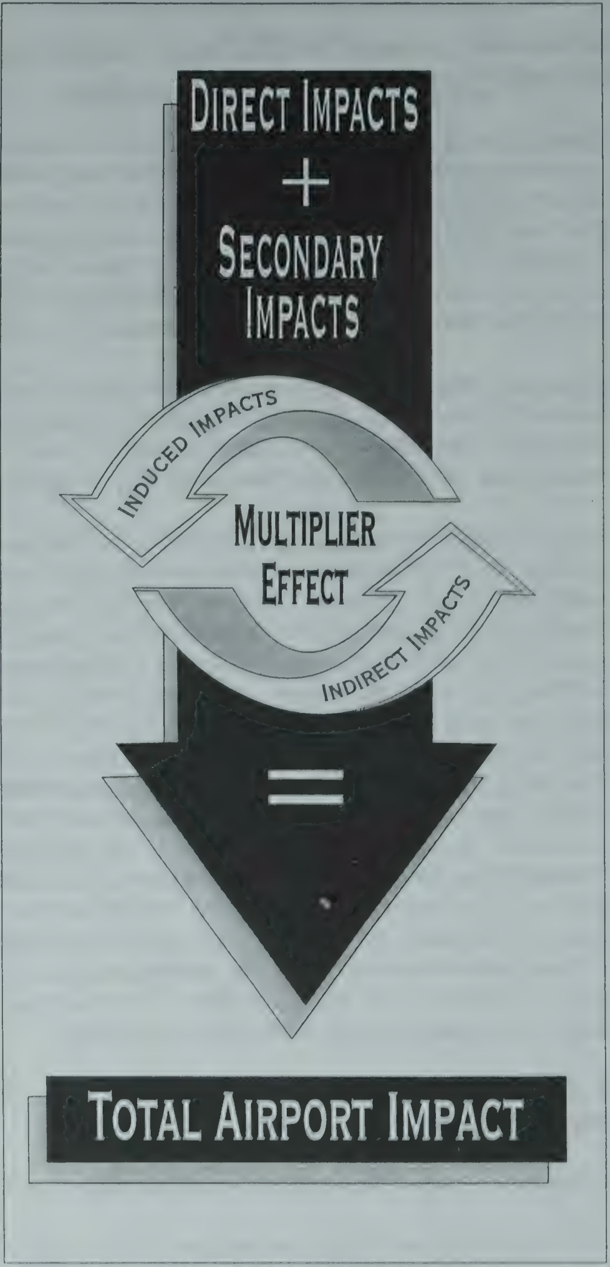
- Secondary Impacts - Secondary impacts or benefits are a combination of indirect and induced impacts. All estimates of secondary impacts were produced through econometric modeling. For this analysis, indirect impacts are quantified as those benefits that occur as a result of businesses supporting the industry being modeled.

  Induced impacts are another important component of the secondary benefit category. All direct or first round airport-related spending, payroll, and employment result in additional spin-off or "induced" economic benefits. Benefits starting at an airport will ripple through or "multiply" within the State's economy. As an airport employee spends his or her salary for housing, food, or services, associated spending, payroll, and employment levels in New Jersey are increased. For example, if an FBO employee earns $100 at an airport and uses it to buy $100 worth of groceries, he is $100 better off. In addition, the grocer is also better off because he has the $100. The grocer then uses this money to pay his suppliers and employees, all of whom are slightly better off because of the original expenditure by the FBO employee. These successive waves of employment, payroll, and re-spending (induced impacts) continue within the economy. For each wave of spending beyond the first round, a portion of the re-spending takes place outside the State resulting in economic leakage. Therefore, the amount of the original dollar available to be re-spent is reduced with each successive wave of spending until it is virtually nonexistent. This cycle is known as the multiplier effect. The multiplier effect is considered a secondary economic impact or benefit in this analysis.

- Total Impacts - Total impacts or benefits are the sum of all direct and secondary impacts attributable to the airport or system of airports.

Exhibit 2 presents a graphic depicting the interrelationship of the impact categories.

Direct and secondary benefits (both indirect and induced impacts) can be combined to provide an estimate of the total economic impact of the airport; however, secondary benefits are not as easily measured as direct impacts. Therefore, some method of estimating



Economic Impacts Components

Exhibit 2

secondary benefits must be employed. One of the best ways to estimate these secondary impacts is with the use of an input-output model.

The input-output model used to generate multipliers for this analysis is the Impact Analysis for Planning (IMPLAN) system. This modeling process is considered to be one of the leading methods currently available for estimating the total economic value of an industry. The IMPLAN model was developed by the U.S. Forestry Service in cooperation with several other governmental agencies. An input-output model, in its most basic form, is a linear model of estimates of all purchases and sales between the various sectors of an economy. IMPLAN consists of a large economic database that is used to generate input-output tables. This model includes data from sources such as Dunn and Bradstreet, the U.S. Department of Commerce, and the U.S. Bureau of the Census. In order to assure the economic impact analysis was specific to New Jersey, IMPLAN multipliers and data tables specific to the State were obtained for all industry sectors.

The IMPLAN input-output model used for this analysis requires direct impact estimates for three separate components of the economy. These categories are:

- **Employment** - Employment is based on full-time equivalent positions. For example, two part-time workers are assumed to equal one full-time position.

- **Payroll** - Payroll is the annual salary paid to all workers.

- **Output (Spending)** - Output for on-airport tenant benefits is typically assumed to be the sum of annual gross sales and average annual capital expenditures. While this methodology works well for profit-oriented tenants, it must be modified for government tenants and visitor impacts. Government output is equated with the payroll, other expenditures, and average annual capital improvement costs. For visitor impacts, output is assumed to equal annual visitor expenditures.

It should be noted that the payroll and output impact categories are exclusive and cannot be combined. Payroll and output cannot be combined because elements of economic benefit related to payroll are also contained, to some extent, in the output estimate. Each of the three impact categories stands alone as a measure of an airport's total economic impact.

B. Economic Impacts

Economic impacts are discussed for on-airport tenants and visitors to each of the New Jersey airports analyzed in this report. As previously mentioned, there are two main groups that typically comprise the majority of the airport's direct impacts. These groups are:

- **On-Airport Tenants** - This category includes any tenants at an airport, such as fixed base operators (FBOs), flight schools, concessionaires, airport restaurants, and government agencies located on the airport. The last group includes public airport sponsors and the Federal Aviation Administration (FAA).

- **General Aviation Visitors** - This category includes estimated non-local passengers arriving via private or corporate aircraft. For this analysis, general aviation visitors were assumed to be associated with that portion of the airport's itinerant general aviation activity which is truly transient (or visiting) in nature. Direct impacts for this group were identified by using survey data collected with the assistance of selected airport FBOs throughout the State. General aviation visitors impacts were further refined via survey data to account for business verses pleasure/personal trips. In New Jersey as a result of highway congestion in the urban areas, many employers use general aviation aircraft for conducting business in the State. The economic benefit generated by this travel is realized primarily by the tenants at the airport accommodating the "visiting" flight. Economic expenditures for this category of in-state business travelers occur primarily on the airport visited in the form of fuel purchases and FBO-related expenditures. Economic benefits resulting from this type of travel are calculated as part of the tenant category.

These two groups of airport users (tenants and visitors) are typically responsible for the vast majority of the direct aviation-related economic impacts associated with the study airports. The direct impacts for these two groups were obtained through survey efforts, airport visits, and New Jersey-specific demographic data. In addition, IMPLAN multipliers are applied to these direct impacts to estimate subsequent secondary (indirect and induced) economic impacts.

1. Population Identification

One of the most important aspects of the economic impact analysis was to accurately identify direct impact levels for each aviation-related group (tenants and general aviation visitors for the base year 1994). This aspect of the analysis was important to ensure that final economic impact estimates were as statistically valid as possible, since secondary benefits stem from the direct impacts. As mentioned above, airport tenants and general aviation visitors are responsible for the majority of the direct economic contribution related to New Jersey's general aviation airports.

a. Airport Tenants

For the airport tenant category, economic contributions were identified from the various tenants located on airport property. All airport tenants were grouped into several categories to aid in data interpolation. These categories include:

- Government/management (this category includes airport management, city/county personnel, FAA, and other government agencies located on the airport)
- Concessions
- FBO/Flight Instruction/Aircraft Maintenance
- Air Taxi/Charter Operator/Air Freight
- Non-Aviation Businesses

Each airport sponsor/owner of the study's general aviation airports was contacted to provide names, mailing addresses, and telephone numbers for each of their on-airport tenants. Only tenants that had employees located on airport property during 1994 were included in this analysis. Follow-up telephone calls and mailings were used to verify the initial data.

b. General Aviation Air Traveler Visitors

Through contact with each of the general aviation airports, it is possible to identify all tenants and to collect data related to their employment, payroll, and expenditures (output). To calculate the economic benefit of the general aviation airports, it was necessary to first estimate the number of visitors using each airport. Estimates on these visitor's average expenditures were also required.

The number of visitors attributable to general aviation air travel is based on the estimated number of true transient general aviation flights at each specific airport. By definition, true transient flights are assumed to have departed an airport at least 150 miles away from the airport being examined. According to the Aircraft Owners and Pilots Association (AOPA), approximately one-third of all itinerant operations are typically true transient flights. Itinerant operations are defined as non-training flights or aircraft that enter or leave an airport's airspace. Each airport's itinerant operations were estimated based on FAA tower data, airport management estimates, DVRPC and NJDOT records, FAA annual inspection records, and on-site field visits.

Data gathered from the New Jersey visitor survey indicated that each transient operation carries an average of 3.6 persons when business is the main purpose of the flight. A pleasure/personal transient operation averages 2.3 persons per aircraft. For the four largest airports (Teterboro, Trenton Mercer, Morristown, and Essex), a slightly higher number of passengers per aircraft was used to account for the larger business aircraft using these airports. According to this study's survey data and the National Business Aircraft Association (NBAA), approximately 5.5 visitors per aircraft can be anticipated at airports serving a high volume of corporate jet traffic. All averages include all passengers as well as the pilot. This information was used to estimate the number of persons per true transient flight at each airport.

Visitors using general aviation aircraft have expenditures for lodging, food and beverage, transportation, and retail/entertainment, thereby generating important economic impacts throughout the State. Data from the general aviation visitor survey indicate that an average stay in New Jersey for both business and pleasure/personal visitors is approximately 1.5 days. It is important to note that many visitors stay for less than one day. **Table 4** presents the average visitor profile as determined by this study's survey effort.

TABLE 4

GENERAL AVIATION VISITOR PROFILE

	Business	**Pleasure**
Average Persons/Aircraft	3.6 [1]	2.3
Average Stay	1.5 days	1.5 days
Average Expenditure	$175 per day	$85 per day

1 At airports with a significant amount of business/corporate jet traffic, an average of 5.5 persons per aircraft was applied.

The methodology used for this study was derived from similar economic impact studies and from data provided by AOPA. An example of how overall general aviation visitor impacts were calculated at study airports follows:

- The number of itinerant general aviation arrivals was estimated using data obtained from tower data, airport management, FAA 5010 forms, DVRPC and NJDOT data, and on-site visits. For example, if an airport has 30,000 annual itinerant operations (both arrivals and departures), dividing 30,000 annual itinerant operations by two yields 15,000 annual itinerant arrivals.

- The number of itinerant arrivals performed by true transients is required to calculate visitor impacts. According to AOPA, it is estimated that 33 percent of itinerant arrivals at general aviation airports are typically true transients. These true transient flights are equated with either business or pleasure visitors. Approximately 33 percent of 15,000 itinerant arrivals equals 5,000 true transient arrivals.[1]

- According to the survey data, the average number of occupants, including the pilot, per general aviation aircraft is 3.6 persons for business travel and 2.3 persons per pleasure/personal travel. The survey data tempered with data gathered during the on-site visits provided an estimate of the business/pleasure split for all itinerant traffic. The average trip length for both visitor categories using general aviation is approximately 1.5 days. While some visitors will stay for several days, many visitors using general aviation will stay for only a few hours. This is especially true for flights that are intrastate. Using aircraft occupancy rates, business/pleasure splits, and average trip durations, the number of general aviation visitor days can be calculated. For this example, assuming a 50-50 business pleasure split, the 5,000 true transient arrivals yield the following number of visitor days:

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[1] At Teterboro, based on airport records, a higher percentage was used.

Business (50%)	2,500 arrivals × 1.5 days × 3.6 persons/aircraft = 13,500 days
Pleasure (50%)	2,500 arrivals × 1.5 days × 2.3 persons/aircraft = 8,625 days

Total visitor days = 22,125

It is important to note that for many of New Jersey's general aviation airports, the actual percentage of business activity exceeds the 50 percent figure used in this example. The actual business/pleasure split at each airport varied depending on the airport's operating characteristics, market area, and available facilities.

- To calculate the impact these visitors have on the economy, it was necessary to estimate average expenditures per visitor. The visitor survey indicated that each business-related general aviation visitor typically spends $175 dollars per day. The typical pleasure/personal visitor spends an average of $85 per day. The typical visitor expenditure was then applied to the estimated number of visitor days to produce direct visitor expenditures (output). This expenditure figure is equated with direct visitor output.

  Business expenditures (50%) 13,500 days × $175 = $2,362,500
  Pleasure expenditures (50%) 8,625 days × $85 = $733,125

  Total visitor output for this example is = $3,095,625

- To determine direct income and employment impacts, IMPLAN ratios based on $1 million of output were used for each industrial category. For example, ratios developed by the IMPLAN model indicate that for every $1 million of direct visitor output approximately 26.6 full-time positions are created. Visitors using general aviation at this example airport would then support over 82 full-time positions. The average statewide salary for service/retail industries ($23,700) is then applied to the estimate of employment to determine direct payroll impacts associated with general aviation visitors. For this example, visitor-related direct payroll is equal to $1.9 million (82 employees X $23,700).

It is important to note that the foregoing was an example of how impacts are calculated. Actual data for each airport analyzed in this study varies considerably. **Table 5** and **Table 6** present the estimated general aviation visitor impacts for each of the study airports.

c. Statewide Business and Industry Impacts

To assess the business community's dependence on New Jersey's system of general aviation airports, a separate survey of non-aviation businesses was undertaken. Using a database of New Jersey businesses prepared by Harris Publishing, Inc., a sample of more than 5,000 businesses and industries with more than 20 employees was obtained. In addition, airport managers provided names of more than 270 companies that are known to use general aviation airports. These two lists consisted of manufacturers, various service sectors, real estate, and transportation businesses. Non-aviation business impacts are considered separately from the tenant and visitor impacts. This business survey and its results are discussed in detail in subsequent sections of this analysis.

2. Population Sampling

The sampling process for this study was accomplished using independent survey efforts. Separate surveys of on-airport tenants, registered aircraft owners, visitors using general aviation, and non-aviation businesses were completed. **Appendix A** contains sample surveys administered to each of the identified populations. These survey efforts are described in the following sections.

a. Tenant/Management Survey

Each airport's tenant list was obtained via on-site visits and telephone calls. These tenant lists were further refined and expanded during additional on-site visits. Each tenant, including the airport sponsor and/or owner, was mailed a survey designed to categorize specific information. An example of this survey and its accompanying cover letter are provided in Appendix A. The following types of data were requested from all airport tenants:

- Tenants were asked to indicate which aviation activity applies to their business. Choices included management, FBO, cargo, charter, flight instruction, etc.
- Requests for expenditure data were broken down into four main categories (salary; property taxes; capital improvements for 1992, 1993, and 1994; and other operating

TABLE 5

Economic Impact of General Aviation in New Jersey

ANNUAL OPERATIONS

Airport	Estimated Annual GA Operations	Percent Itinerant	Itinerant Operations	Itinerant GA Arrivals	Estimated True Transient Arrivals
Aeroflex-Andover	23,000	40%	9,200	4,600	1,533
Alexandria Field	45,000	22%	9,900	4,950	1,650
Allaire	173,000	30%	51,900	25,950	8,650
Bader Field	25,000	60%	15,000	7,500	2,500
Blairstown	49,300	49%	24,200	12,100	4,033
Camden County	23,500	19%	3,900	1,950	650
Cape May County	60,000	50%	30,000	15,000	5,000
Cross Keys	66,500	14%	9,300	4,650	1,550
Essex County	217,500	55%	119,600	59,800	19,933
Flying W	56,000	50%	28,000	14,000	4,667
Greenwood Lake	30,000	46%	13,800	6,900	2,300
Hammonton Municipal	49,500	24%	11,900	5,950	1,983
Kupper	41,700	52%	21,700	10,850	3,617
Lakewood	34,000	56%	19,000	9,500	3,167
Lincoln Park	80,500	17%	13,700	6,850	2,283
Linden	75,000	50%	37,500	18,750	6,250
Marlboro	39,000	31%	12,100	6,050	2,017
Millville Municipal	70,000	49%	34,300	17,150	5,717
Morristown Municipal	225,000	58%	130,500	65,250	21,750
Ocean City Municipal	44,000	80%	35,200	17,600	5,867
Old Bridge	21,500	7%	1,500	750	250
Oldmans	10,000	30%	3,000	1,500	500
Other Airports	20,000	43%	8,600	4,300	1,433
Princeton	75,000	27%	20,300	10,150	3,383
Red Lion	18,000	5%	900	450	150
Robert J. Miller Airpark	35,500	42%	14,900	7,450	2,483
Sky Manor	46,000	50%	23,000	11,500	3,833
Solberg-Hunterdon	87,000	52%	45,200	22,600	7,533
Somerset	95,000	34%	32,300	16,150	5,383
South Jersey Regional	58,000	40%	23,200	11,600	3,867
Sussex	67,000	14%	9,400	4,700	1,567
Teterboro	158,100	98%	155,100	77,550	57,742
Trenton Mercer	146,100	58%	84,700	42,350	14,117
Trenton-Robbinsville	23,000	41%	9,400	4,700	1,567
Trinca	7,000	36%	2,500	1,250	417
Vineland-Downstown	10,500	4%	400	200	67
Woodbine Municipal	18,000	44%	7,900	3,950	1,317
TOTAL	**2,323,200**		**1,073,000**	**536,500**	**210,725**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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TABLE 6

Economic Impact of General Aviation in New Jersey

ANNUAL VISITOR EXPENDITURES

Airport	Estimated Annual GA Visitors	Annual Number of Days Stayed	Annual GA Visitor Expenditures
Aeroflex-Andover	3,800	5,700	$565,500
Alexandria Field	4,200	6,300	$697,500
Allaire	27,800	41,700	$6,487,500
Bader Field	6,100	9,150	$899,300
Blairstown	10,900	16,350	$1,983,800
Camden County	1,900	2,850	$404,300
Cape May County	13,500	20,250	$2,450,300
Cross Keys	4,600	6,900	$964,500
Essex County	90,500	135,750	$21,893,300
Flying W	13,100	19,650	$2,574,800
Greenwood Lake	6,500	9,750	$1,274,300
Hammonton Municipal	5,300	7,950	$959,300
Kupper	10,700	16,050	$2,241,800
Lakewood	9,300	13,950	$1,955,300
Lincoln Park	5,800	8,700	$955,500
Linden	20,100	30,150	$4,695,800
Marlboro	4,900	7,350	$719,300
Millville Municipal	18,000	27,000	$4,104,000
Morristown Municipal	105,700	158,550	$26,396,300
Ocean City Municipal	15,700	23,550	$2,852,300
Old Bridge	600	900	$90,000
Oldmans	1,200	1,800	$180,000
Other Airports	3,500	5,250	$513,800
Princeton	9,600	14,400	$1,885,500
Red Lion	400	600	$64,500
Robert J. Miller Airpark	7,700	11,550	$1,710,800
Sky Manor	10,300	15,450	$1,866,800
Solberg-Hunterdon	21,200	31,800	$4,161,000
Somerset	17,300	25,950	$4,041,800
South Jersey Regional	11,400	17,100	$2,398,500
Sussex	4,200	6,300	$765,000
Teterboro	299,100	448,650	$76,718,300
Trenton Mercer	68,600	102,900	$17,130,000
Trenton-Robbinsville	4,500	6,750	$884,300
Trinca	1,100	1,650	$167,300
Vineland-Downstown	100	150	$12,800
Woodbine Municipal	3,200	4,800	$475,500
TOTAL	**842,400**	**1,263,600**	**$198,140,600**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

01/19/96

expenses).[2] These all-inclusive expenditure categories were designed to make the surveys simple to fill out, thus maximizing overall response rates. In addition, gross sales were also requested. Capital improvements, as reported by each respondent, were averaged to yield a typical year's expenditure.

- Employment data were divided into full-time and part-time employees. This breakout was necessary to develop a full-time equivalency (FEQ) estimate. For these analyses, it was assumed that two part-time employees equal one full-time employee (i.e., part-time employees, on average, work four hours per day).

- Airport tenants were also asked to provide information on the ways their airport provides "quality of life" benefits. Respondents were asked to provide data on the types of activity that occur at their airports. Examples include pipeline patrol, emergency air care, fire fighting, police patrol, etc.

- Respondents were asked to provide other qualitative data regarding the unique circumstances at their airport that promote or inhibit aviation activity.

While a high percentage of the tenants returned their surveys via the mail, a 100 percent response rate was desired for the tenant survey. Follow-up telephone calls were made to non-responding tenants and to airport managers to obtain a 100 percent response rate for on-airport tenant employment. For the tenants not willing to supply complete information on payroll and output, ratios were developed based on average payroll and output per employee. For example, average output per employee for all reporting FBOs for each study airport was used to estimate the annual sales for an FBO not reporting sales.

From the information supplied, each tenant's response was grouped by their type of activity at the airport. For IMPLAN modeling, these tenant categories were grouped into their standard industrial classification (SIC) code. For example, aircraft maintenance, flight schools, FBOs, air cargo, and corporate flight departments were combined in the air transportation SIC codes. Government impacts were divided among various construction related SIC codes.

b. General Aviation Visitor Survey

A survey of visitors arriving via general aviation flights was also undertaken. FBOs at each airport were asked to distribute surveys to pilots and passengers arriving via transient general aviation flights. Approximately 5,000 surveys were distributed to FBOs throughout the State. This survey was available for approximately two months at more than 50 FBOs. This survey was designed with a prepaid return so the visitor could return it at their convenience. Data requested in this survey included:

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[2] Other operating expenses include total operating expenses less payroll, taxes, and capital expenditures.

- The name of the airport where the survey was received
- If their trip was business-related, the category (manufacturing, retail, services, etc.) that best describes your company and the business being visited
- The name/address of the respondent's company and the same for the company they are visiting
- Number of persons per flight
- Trip purpose - business or personal
- Length of stay
- Total expenditures for:
    - Hotel/motel
    - Food/beverage
    - Rental car
    - Entertainment
    - FBO services
    - Other
- Number of persons included in the expenditure estimates
- What other New Jersey airports do they use on a regular basis
- Where their aircraft is based

A copy of the general aviation passenger survey is provided in Appendix A. As previously noted, more than 50 FBOs statewide were asked to distribute visitor surveys.

c. *Aircraft Owners Survey*

Data from the on-site visits conducted for this study showed that there are approximately 4,300 aircraft based at all general aviation airports in New Jersey. The FAA prepares a monthly listing of aircraft owners (registrants) for each county in the country. For New Jersey, many of the aircraft based at airports within the State are actually registered in Delaware. Since the State does not maintain a list of aircraft based at its system of general aviation airports or a listing of aircraft registered in the State, the FAA's listing was used to contact aircraft owners in the State. A listing of approximately 1,700 registered aircraft owners in the State were mailed surveys to obtain data regarding their business use of New Jersey's general aviation airports. The following types of information were requested:

- Where do you base your aircraft
- What type of aircraft do you own
- What percentage of your operations are business-related
- If you fly for business, what category (manufacturing, trade, service, etc.) best describes your business
- How many employees does your business have in the State
- What is the estimated annual payroll of your business
- What is your approximate level of sales in State
- What percentage of your company's annual business activity is tied to general aviation
- How far is your business from the airport where you base your plane
- What other New Jersey airports do you use for business purposes
- How important is general aviation to the day-to-day operation of your business

d. Non-Aviation Business Survey

Aside from jobs associated with the on-airport tenants and general aviation visitors, there are many employers in New Jersey who depend on the general aviation system. Businesses depend on the transportation efficiency provided for moving both goods and people. As a result, there is additional employment throughout the State that benefits from the "value-added" by general aviation air transportation. A separate survey was designed to gather data from employers throughout the State in order to identify this additional value-added employment. For selected businesses and industries, the following types of data were collected:

- Business location

- The general category that best describes the company (manufacturing, services, retail trade, etc.)
- Employee utilization of commercial airline service
- Number of annual commercial air trips by the company
- Company ownership or charter of general aviation aircraft and use of cargo/express services
- Total employment in New Jersey
- 1994 payroll and gross sales
- Percentage of business activity dependent on general aviation airports
- Importance of various factors, including proximity to an airport, to the location of the business

More than 5,000 businesses were surveyed throughout the State. It is important to note that this sample of businesses included manufacturing companies and service industries that are considered likely to use general aviation. Businesses known to use specific general aviation airports, as provided by airport management, were also mailed surveys.

e. Study Survey Summary

As noted, four separate surveys were designed and administered to collect data for the economic impact study. These surveys included airport tenants/owners; general aviation visitors; aircraft owners; and businesses throughout the State. The results of these surveys are used in subsequent sections of this study to identify a wide variety of qualitative and quantitative benefits that are associated with the day-to-day operation of New Jersey's system of general aviation airports.

3. Impact Multipliers

Employment, payroll, and output impacts derived from the on-airport tenant and visitor surveys represent the direct impacts associated with the State's general aviation airports. Direct benefits are also referred to as first round impacts when discussing a particular group. As these first round expenditures are released in the economy, they circulate among other sectors of the economy, creating successive waves of additional spending. This phenomenon is referred to as the multiplier effect. Multiplier effects are referred to in this study as secondary impacts. Secondary impacts include both indirect and induced impacts.

Multiplier effects arise from various interdependencies within an economic system. For example, the operation of an airport requires inputs in the form of supplies, equipment, and maintenance. These inputs generate a boost in sales for those firms or businesses providing these products. Moreover, these goods and services themselves require inputs for their production. The process continues as a large number of impacts ripple through the economy. The total requirement for goods and services is a multiple of the direct needs of the New Jersey general aviation airports, hence the term "multiplier."

Multipliers used to calculate secondary impacts (indirect and induced) were derived from the IMPLAN model. These multipliers were developed specifically to measure economic impact in the State of New Jersey. The IMPLAN multipliers present an accurate, though conservative picture of the total economic value of general aviation in the State of New Jersey. Previous economic impact studies, namely the 1988 Economic Impact of New Jersey Airports Study, used more robust multipliers to generate estimates of indirect and induced impacts, termed secondary impacts in this study. The IMPLAN multipliers are accepted nationally, as a reliable source of input-output multipliers that describe the economic linkages in a regional or statewide economy. Multipliers used in the 1988 Study were almost double the IMPLAN multipliers used in this analysis. The more conservative multipliers used in this study provide a more realistic picture of total benefits stemming from the State's airport system.

Individual multipliers must be used for each sector of the economy being modeled. As previously mentioned, individual IMPLAN multipliers were developed for various SIC codes. The SIC is the most commonly used sector-specific list used to develop multipliers. Select SICs used for modeling on-airport tenant and visitor impacts are depicted in **Table 7**. While these SIC groups do not cover all on-airport tenants and arriving visitor benefit categories, they do provide a representative average for generating multipliers. For example, all impacts resulting from FBOs, flight schools, aircraft maintenance, air cargo, and corporate flight departments are included in the air transportation SIC. Government expenditures at the airports were grouped into engineering services and various types of construction SIC codes. Visitor expenditures were grouped in retail sales, auto rental, hotel/motel, and food/beverage SIC codes.

The multipliers presented in Table 7 were used in this analysis to estimate secondary benefits. For example, $100 in direct expenditures (output) in the air transportation sector creates secondary output impacts equivalent to $71.

Table 7

TOTAL WEIGHTED AVERAGE IMPACT MULTIPLIERS

Standard Industrial Classification	Total Output Multiplier	Total Payroll Multiplier	Total Employment Multiplier
AVIATION RELATED TENANT MULTIPLIERS			
Air Transportation	1.71	1.69	1.98
GOVERNMENT TENANT MULTIPLIERS			
Government Activities	1.59	1.51	1.66
- Maintenance Construction			
- New Building Construction			
- Engineering and Architecture Services			
VISITOR MULTIPLIERS			
Visitor Impact	2.07	1.72	1.59
- Hotel/Motel			
- Food/Beverage			
- Auto Rental			
- Misc. Retail Sales			

Source: New Jersey IMPLAN Input-Output Tables

Although actual survey data for tenants was used for estimating direct output, it was not possible to obtain actual direct payroll and employment figures resulting from the activities of visitors. The IMPLAN model, however, provides multipliers that calculate these important employment impacts based on estimates of visitor output. The IMPLAN model develops ratios for each SIC code which indicate the direct employment impacts anticipated for every $1 million generated in output. Every $1 million dollars initially spent by visitors in the State results in the creation of 26.6 direct full time employees. For example, if an airport's visitors spend $2.1 million (direct output), the direct employment generated equals 55.9 full time positions (2.1 x 26.6 = 55.9). Average annual salary data can then be applied to the estimate of employment to produce direct payroll impacts related to visitors. Multipliers can then be applied to these direct output, payroll, and employment estimates to calculate secondary and total visitor impact.

3. STATEWIDE IMPACTS OF GENERAL AVIATION

An extensive network of general aviation airports is available to accommodate New Jersey's air travel needs. Thirty-six airports were selected for study in this analysis; all but two of these airports have paved runways. These general aviation airports contribute jobs, payroll, and output to the

State's economy. In addition, this study also analyzes the combined impacts from 11 turf airports and one seaplane bases. For this analysis, the impacts from these two smaller airports were grouped together for presentation. Since each of the airports generally has only one tenant, this grouping has helped to preserve confidentiality. Each of the airports was surveyed to estimate expenditures and employment levels that affect the economy. Most of the general aviation airports in the State have on-airport tenants that are engaged in aviation-related activity whose impacts were included in this analysis. Impacts from air traveler visitors using general aviation aircraft were also assessed.

NJDOT estimates that in 1994 there were over 4,300 active general aviation or based aircraft in the State at the study airports. During the summer season, the number of based aircraft is somewhat higher. During 1994, there were over 2.3 million aircraft operations at the general aviation airports included in this study.

While many of the air traveler visitors to New Jersey use commercial service airports, a significant number of visitors arrive via private and business aircraft. Based on operational records, survey data, and industry averages, it is estimated that 842,400 visitors, representing 1,263,600 visitor days, were accommodated at the State's general aviation airports. These visitors create direct jobs and payroll throughout all sectors of the State's economy through their expenditures.

A. Employment Impacts

This study's findings indicate that general aviation airports in New Jersey are an important source of jobs. Employment, as defined in this analysis, is based on "Full Time Equivalent" (FEQ) estimates, where two part-time jobs are assumed to equal one full-time job. Employment impacts are calculated for both on-airport tenants and visitors using general aviation.

1. Tenant Employment

Table 8 lists the total number of jobs generated by on-airport aviation-related tenants at each study airport. The direct jobs comprise those people who are engaged in the provision of aviation services on the airport. In the case of on-airport military aviation units, the full and part-time military, reservists, and civilian employees were also included. In total, there were approximately 3,930 jobs directly created by the operation of New Jersey's general aviation airports in 1994. It is important to note that this employment estimate does not include additional non-aviation businesses which are located on an airport. While these additional jobs are noted in the airport write-ups presented at the conclusion of this report, they are not considered in the calculation of the aviation-related impacts.

Secondary impacts are those jobs which are created by the multiplier effects stemming from the direct jobs associated with New Jersey's general aviation airport tenants. For example, an employee of a fuel distributor may owe a portion of his job to an airport since the

TABLE 8

Economic Impact of General Aviation in New Jersey

ON-AIRPORT TENANT EMPLOYMENT

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	12.0	11.2	23.2
Alexandria Field	20.0	19.6	39.6
Allaire	98.5	96.6	195.1
Bader Field	0.5	0.9	1.9
Blairstown	16.5	16.2	32.7
Camden County	8.5	8.3	16.8
Cape May County	76.5	60.3	136.8
Cross Keys	18.5	18.2	36.7
Essex County	121.5	110.3	231.8
Flying W	34.5	33.8	68.3
Greenwood Lake	9.0	8.8	17.8
Hammonton Municipal	11.5	11.3	22.8
Kupper	30.5	29.9	60.4
Lakewood	7.0	6.9	13.9
Lincoln Park	27.5	27.0	54.5
Linden	11.0	10.8	21.8
Marlboro	2.5	2.5	5.0
Millville Municipal	671.5	631.2	1,302.7
Morristown Municipal	372.0	353.3	725.3
Ocean City Municipal	12.0	9.5	21.5
Old Bridge	7.5	7.4	14.9
Oldmans	2.0	1.9	3.9
Other Airports	19.0	18.7	37.7
Princeton	46.5	45.6	92.1
Red Lion	4.5	4.4	8.9
Robert J. Miller Airpark	24.0	23.5	47.5
Sky Manor	39.5	38.8	78.3
Solberg-Hunterdon	19.0	18.7	37.7
Somerset	18.0	17.6	35.6
South Jersey Regional	72.0	70.5	142.5
Sussex	14.5	14.3	28.8
Teterboro	1,367.5	1,300.6	2,668.1
Trenton Mercer	701.5	593.4	1,294.9
Trenton-Robbinsville	12.5	12.3	24.8
Trinca	3.5	3.4	6.9
Vineland-Downstown	14.0	13.7	27.7
Woodbine Municipal	3.5	3.4	6.9
STATEWIDE TOTAL	**3,931**	**3,654**	**7,585**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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distributor sells fuel to the airport's FBO. As a result of the on-airport tenant activity, additional secondary employment is created. Secondary impacts associated with the day-to-day operation of New Jersey's airports add more than 3,650 full-time positions to the State's economy. When direct and secondary employment are considered, New Jersey's general aviation airport tenants contributed over 7,580 jobs to the State's employment base in 1994.

2. General Aviation Visitor Employment

When visitors fly into a general aviation airport, either for business or pleasure, they typically spend money, thereby helping to support additional employment. **Table 9** identifies the number of New Jersey employees supported by visitors arriving at general aviation airports. As previously discussed, it is possible to calculate the number of visitors and, subsequently, the number of jobs supported by these visitors. These direct jobs are attributed to a variety of sectors, however, the majority of these jobs are in the hotel/motel, restaurant, recreational and entertainment, and retail sectors. As a result of 1994 general aviation visitor expenditures, there were approximately 5,280 additional full-time positions supported in the State.

Secondary impacts include those jobs that exist due to continued circulation of visitor expenditures within the New Jersey economy. Secondary impacts resulted in more than 3,090 full-time positions. When 1994 direct and secondary visitor-related employment impacts are combined, approximately 8,380 jobs can be attributed to general aviation visitors to the State.

3. Total Employment

Table 10 identifies the total number of employees who are directly related to activities at the general aviation airports in the State. As a result of on-airport tenants and visitors using general aviation, there are over 9,210 employees directly related to New Jersey's system of general aviation airports. The multiplier effect added 6,750 additional jobs. In total, 15,960 jobs are attributable to New Jersey's general aviation airports.

B. Payroll Impacts

The employment created by general aviation airports in the State results in payroll expenditures being introduced in the economy. Payroll impacts were calculated for on-airport tenants and visitors using the system of general aviation airports in New Jersey.

1. Tenant Payroll

Table 11 identifies the payroll associated with tenants at each of New Jersey's general aviation airports. For single-tenant airports, information was considered confidential. The

TABLE 9

Economic Impact of General Aviation in New Jersey

GENERAL AVIATION VISITOR EMPLOYMENT

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	15.1	8.8	23.9
Alexandria Field	18.6	10.9	29.5
Allaire	173	101.3	274.3
Bader Field	24	14	38
Blairstown	52.9	31	83.9
Camden County	10.8	6.4	17.2
Cape May County	65.3	38.3	103.6
Cross Keys	25.7	15	40.7
Essex County	583.7	341.8	925.5
Flying W	68.6	40.1	108.7
Greenwood Lake	34	19.9	53.9
Hammonton Municipal	25.6	15	40.6
Kupper	59.8	35	94.8
Lakewood	52.1	30.5	82.6
Lincoln Park	25.5	14.9	40.4
Linden	125.2	73.3	198.5
Marlboro	19.2	11.2	30.4
Millville Municipal	109.4	64.1	173.5
Morristown Municipal	703.8	412.1	1115.9
Ocean City Municipal	76	44.5	120.5
Old Bridge	2.4	1.4	3.8
Oldmans	4.8	2.8	7.6
Other Airports	13.7	8	21.7
Princeton	50.3	29.5	79.8
Red Lion	1.7	1	2.7
Robert J. Miller Airpark	45.6	26.7	72.3
Sky Manor	49.8	29.1	78.9
Solberg-Hunterdon	110.9	64.9	175.8
Somerset	107.8	63.1	170.9
South Jersey Regional	63.9	37.4	101.3
Sussex	20.4	11.9	32.3
Teterboro	2045.4	1197.6	3243
Trenton Mercer	456.7	267.4	724.1
Trenton-Robbinsville	23.6	13.8	37.4
Trinca	4.5	2.7	7.2
Vineland-Downstown	0.3	0.2	0.5
Woodbine Municipal	12.7	7.4	20.1
STATEWIDE TOTAL	**5,283**	**3,093**	**8,376**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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TABLE 10

Economic Impact of General Aviation in New Jersey

TOTAL EMPLOYMENT (VISITOR AND TENANT)

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	27.1	20.0	47.1
Alexandria Field	38.6	30.5	69.1
Allaire	271.5	197.9	469.4
Bader Field	24.5	14.9	39.9
Blairstown	69.4	47.2	116.6
Camden County	19.3	14.7	34.0
Cape May County	141.8	98.6	240.4
Cross Keys	44.2	33.2	77.4
Essex County	705.2	452.1	1,157.3
Flying W	103.1	73.9	177.0
Greenwood Lake	43.0	28.7	71.7
Hammonton Municipal	37.1	26.3	63.4
Kupper	90.3	64.9	155.2
Lakewood	59.1	37.4	96.5
Lincoln Park	53.0	41.9	94.9
Linden	136.2	84.1	220.3
Marlboro	21.7	13.7	35.4
Millville Municipal	780.9	695.3	1,476.2
Morristown Municipal	1,075.8	765.4	1,841.2
Ocean City Municipal	88.0	54.0	142.0
Old Bridge	9.9	8.8	18.7
Oldmans	6.8	4.7	11.5
Other Airports	32.7	26.7	59.4
Princeton	96.8	75.1	171.9
Red Lion	6.2	5.4	11.6
Robert J. Miller Airpark	69.6	50.2	119.8
Sky Manor	89.3	67.9	157.2
Solberg-Hunterdon	129.9	83.6	213.5
Somerset	125.8	80.7	206.5
South Jersey Regional	135.9	107.9	243.8
Sussex	34.9	26.2	61.1
Teterboro	3,412.9	2,498.2	5,911.1
Trenton Mercer	1,158.2	860.8	2,019.0
Trenton-Robbinsville	36.1	26.1	62.2
Trinca	8.0	6.1	14.1
Vineland-Downstown	14.3	13.9	28.2
Woodbine Municipal	16.2	10.8	27.0
STATEWIDE TOTAL	**9,213**	**6,747**	**15,961**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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TABLE 11

Economic Impact of General Aviation in New Jersey

ON-AIRPORT TENANT PAYROLL

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	$343,000	$237,000	$580,000
Alexandria Field	$326,400	$224,500	$550,900
Allaire	$2,607,900	$1,793,600	$4,401,500
Bader Field	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Blairstown	$368,200	$253,200	$621,400
Camden County	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Cape May County	$2,063,200	$1,461,300	$3,524,500
Cross Keys	$349,300	$240,300	$589,600
Essex County	$3,280,900	$2,285,600	$5,566,500
Flying W	$741,900	$510,200	$1,252,100
Greenwood Lake	$106,400	$73,200	$179,600
Hammonton Municipal	$531,900	$365,800	$897,700
Kupper	$483,600	$332,600	$816,200
Lakewood	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Lincoln Park	$710,500	$488,600	$1,199,100
Linden	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Marlboro	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Millville Municipal	$21,134,900	$14,647,000	$35,781,900
Morristown Municipal	$16,084,100	$11,108,000	$27,192,100
Ocean City Municipal	$276,800	$196,200	$473,000
Old Bridge	$203,600	$140,000	$343,600
Oldmans	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Other Airports	$460,700	$316,800	$777,500
Princeton	$925,900	$636,800	$1,562,700
Red Lion	$140,800	$96,800	$237,600
Robert J. Miller Airpark	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Sky Manor	$758,600	$521,700	$1,280,300
Solberg-Hunterdon	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Somerset	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
South Jersey Regional	$2,247,400	$1,546,300	$3,793,700
Sussex	$328,900	$226,200	$555,100
Teterboro	$53,578,800	$37,073,600	$90,652,400
Trenton Mercer	$28,158,200	$19,757,900	$47,916,100
Trenton-Robbinsville	$345,700	$237,700	$583,400
Trinca	$94,900	$65,200	$160,100
Vineland-Downstown	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Woodbine Municipal	$88,000	$60,500	$148,500
STATEWIDE TOTAL	**$139,173,200**	**$96,570,200**	**$235,743,400**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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impact from these airports is included in the State total. In 1994, total direct statewide payroll impacts were $139.2 million. This direct spending ripples throughout the economy creating secondary payroll impacts which can be measured through the use of the IMPLAN model. As in the previous example, a fuel distributor employee owes a portion of his payroll to the sale of fuel at the local airport. This secondary payroll impact related to tenants at New Jersey's system of general aviation airports was estimated at more than $96.6 million. Total payroll for airport tenants in the State, which includes direct and secondary payrolls at general aviation airports, was approximately $235.7 million in 1994.

2. General Aviation Visitor Payroll

Table 12 identifies the payroll attributable to visitors arriving at New Jersey's general aviation airports. Direct payroll impacts include salaries of employees working at the restaurants, hotels/motels, retail businesses, and other service industries that are patronized by general aviation visitors. The direct Statewide payroll attributable to general aviation visitors was estimated at $125.2 million in 1994. Businesses that supply and service these visitor-related industries owe a portion of their payroll to the service industries. As employees of the service industries spend their payroll, the monies continue to circulate generating additional employment and subsequent payroll. Secondary payroll impacts associated with visitor supported payroll were estimated at $89.9 million. When 1994 direct and secondary payroll impacts stemming from general aviation visitors were combined, a total payroll impact of $215.1 million is produced.

3. Total Payroll

The total impact of the combined on-airport tenant and visitor-related payroll is identified in **Table 13**. When all direct impacts were combined for 1994, New Jersey's general aviation airport system was responsible for generating $264.4 million in payroll. With more than $186.5 million in secondary payroll benefits, a total of $450.9 million in annual payroll was created in New Jersey as a result of daily activities at general aviation airports.

C. Output Impacts

For on-airport tenants, output is generally defined as annual gross sales and average annual capital expenditures. For government tenants located on airports, output is defined as the sum of annual capital expenditures, payroll, and operating expenses. Output related to general aviation visitors is defined as expenditures made during their visit. These visitor-related expenditures are typically in the hotel/motel, restaurant, transportation, and retail sectors. Output impacts for general aviation airport tenants and visitors are discussed below.

TABLE 12

Economic Impact of General Aviation in New Jersey

GENERAL AVIATION VISITOR PAYROLL

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	$357,900	$257,200	$615,100
Alexandria Field	$440,800	$316,700	$757,500
Allaire	$4,100,100	$2,945,600	$7,045,700
Bader Field	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Blairstown	$1,253,700	$900,700	$2,154,400
Camden County	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Cape May County	$1,547,600	$1,111,800	$2,659,400
Cross Keys	$609,100	$437,600	$1,046,700
Essex County	$13,833,700	$9,938,200	$23,771,900
Flying W	$1,625,800	$1,168,000	$2,793,800
Greenwood Lake	$805,800	$578,900	$1,384,700
Hammonton Municipal	$606,700	$435,800	$1,042,500
Kupper	$1,417,300	$1,018,200	$2,435,500
Lakewood	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Lincoln Park	$604,400	$434,200	$1,038,600
Linden	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Marlboro	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Millville Municipal	$2,592,800	$1,862,700	$4,455,500
Morristown Municipal	$16,680,100	$11,983,100	$28,663,200
Ocean City Municipal	$1,801,200	$1,294,000	$3,095,200
Old Bridge	$56,900	$40,800	$97,700
Oldmans	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Other Airports	$324,700	$233,300	$558,000
Princeton	$1,192,100	$856,500	$2,048,600
Red Lion	$40,300	$28,900	$69,200
Robert J. Miller Airpark	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Sky Manor	$1,180,300	$847,900	$2,028,200
Solberg-Hunterdon	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Somerset	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
South Jersey Regional	$1,514,400	$1,088,000	$2,602,400
Sussex	$483,500	$347,400	$830,900
Teterboro	$48,476,000	$34,825,600	$83,301,600
Trenton Mercer	$10,823,800	$7,775,900	$18,599,700
Trenton-Robbinsville	$559,300	$401,800	$961,100
Trinca	$106,700	$76,600	$183,300
Vineland-Downstown	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Woodbine Municipal	$301,000	$216,200	$517,200
STATEWIDE TOTAL	**$125,202,600**	**$89,946,800**	**$215,149,400**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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TABLE 13

Economic Impact of General Aviation in New Jersey

TOTAL PAYROLL (VISITOR AND TENANT)

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	$700,900	$494,200	$1,195,100
Alexandria Field	$767,200	$541,200	$1,308,400
Allaire	$6,708,000	$4,739,200	$11,447,200
Bader Field	$581,800	$418,000	$999,800
Blairstown	$1,621,900	$1,153,900	$2,775,800
Camden County	$456,000	$321,400	$777,400
Cape May County	$3,610,800	$2,573,100	$6,183,900
Cross Keys	$958,400	$677,900	$1,636,300
Essex County	$17,114,600	$12,223,800	$29,338,400
Flying W	$2,367,700	$1,678,200	$4,045,900
Greenwood Lake	$912,200	$652,100	$1,564,300
Hammonton Municipal	$1,138,600	$801,600	$1,940,200
Kupper	$1,900,900	$1,350,800	$3,251,700
Lakewood	$1,346,800	$964,100	$2,310,900
Lincoln Park	$1,314,900	$922,800	$2,237,700
Linden	$3,118,200	$2,235,500	$5,353,700
Marlboro	$522,800	$373,500	$896,300
Millville Municipal	$23,727,700	$16,509,700	$40,237,400
Morristown Municipal	$32,764,200	$23,091,100	$55,855,300
Ocean City Municipal	$2,078,000	$1,490,200	$3,568,200
Old Bridge	$260,500	$180,800	$441,300
Oldmans	$137,800	$98,300	$236,100
Other Airports	$785,400	$550,100	$1,335,500
Princeton	$2,118,000	$1,493,300	$3,611,300
Red Lion	$181,100	$125,700	$306,800
Robert J. Miller Airpark	$1,731,100	$1,223,700	$2,954,800
Sky Manor	$1,938,900	$1,369,600	$3,308,500
Solberg-Hunterdon	$2,867,800	$2,053,000	$4,920,800
Somerset	$3,004,900	$2,144,900	$5,149,800
South Jersey Regional	$3,761,800	$2,634,300	$6,396,100
Sussex	$812,400	$573,600	$1,386,000
Teterboro	$102,054,800	$71,899,200	$173,954,000
Trenton Mercer	$38,982,000	$27,533,800	$66,515,800
Trenton-Robbinsville	$905,000	$639,500	$1,544,500
Trinca	$201,600	$141,800	$343,400
Vineland-Downstown	$532,100	$366,100	$898,200
Woodbine Municipal	$389,000	$276,700	$665,700
STATEWIDE TOTAL	**$264,375,800**	**$186,517,000**	**$450,892,800**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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1. Tenant Output

As aviation-related businesses and government tenants located on each airport expend monies, these expenditures ripple throughout New Jersey's economy. For example, if an airport FBO were to construct a hangar on an airport, a significant amount of money would be spent in the economy on construction materials, labor, and services. **Table 14** identifies the direct, secondary, and total tenant output for each of the general aviation airports in the State. Total direct annual output by on-airport tenants is estimated at $521.6 million. Secondary tenant related output or spending impacts are estimated at $369.6 million. When total and secondary impacts are combined, the total annual output for on-airport tenants at New Jersey's general aviation airports is estimated at more than $891.1 million.

2. General Aviation Visitor Output

Table 15 identifies the output attributable to visitors using New Jersey's general aviation airports. The direct output is comparable to visitor expenditures for restaurants, hotels/motels, retail, entertainment, and other service industries as identified by the passenger survey effort. Total direct output by general aviation visitors to New Jersey in 1994 was estimated $198.1 million. As the service industries expend this direct output in the statewide economy, the monies continue to circulate resulting in secondary impacts. These secondary impacts related to visitor output or spending, were estimated at $211.3 million. The total output generated by visitors arriving at New Jersey's general aviation airports in 1994 was $409.4 million.

3. Total Output

The total impact of combined tenant and the general aviation visitor output is identified in **Table 16.** The Statewide direct total output was $719.7 million in 1994. Secondary impacts were estimated at $580.9 million. The combination of direct and secondary output impacts for both tenants and visitors to New Jersey's general aviation airports produces a total Statewide output of more than $1.3 billion.

D. Non-Aviation On-Airport Impacts

While the focus of the analysis was to identify on-airport impacts that are attributable to general aviation, several tenants were identified at study airports that are not aviation-related. While physically located on the airport's property, these tenants do not rely on aviation in their daily business. These businesses, who lease space from various airports, were not included in the previously discussed statewide total since they are not related to aviation. The activities of these tenants could easily be accommodated elsewhere in the community; they just happen to be located on an airport. These additional benefits are listed because they are located on New Jersey's system of general aviation airports. **Table 17** presents the

TABLE 14

Economic Impact of General Aviation in New Jersey

ON-AIRPORT TENANT OUTPUT

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	$1,446,000	$1,023,200	$2,469,200
Alexandria Field	$1,063,500	$757,100	$1,820,600
Allaire	$9,603,800	$6,837,500	$16,441,300
Bader Field	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Blairstown	$1,111,700	$791,500	$1,903,200
Camden County	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Cape May County	$5,845,000	$4,117,000	$9,962,000
Cross Keys	$1,442,300	$1,026,900	$2,469,200
Essex County	$11,084,600	$7,750,100	$18,834,700
Flying W	$1,937,600	$1,379,500	$3,317,100
Greenwood Lake	$850,300	$605,400	$1,455,700
Hammonton Municipal	$6,186,100	$4,404,200	$10,590,300
Kupper	$2,142,600	$1,525,400	$3,668,000
Lakewood	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Lincoln Park	$2,929,900	$2,085,900	$5,015,800
Linden	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Marlboro	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Millville Municipal	$103,433,700	$73,612,900	$177,046,600
Morristown Municipal	$63,490,100	$45,004,700	$108,494,800
Ocean City Municipal	$889,200	$619,800	$1,509,000
Old Bridge	$747,100	$531,900	$1,279,000
Oldmans	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Other Airports	$1,557,200	$1,108,600	$2,665,800
Princeton	$2,777,000	$1,977,100	$4,754,100
Red Lion	$434,000	$309,000	$743,000
Robert J. Miller Airpark	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Sky Manor	$2,082,900	$1,482,900	$3,565,800
Solberg-Hunterdon	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Somerset	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
South Jersey Regional	$6,766,400	$4,817,000	$11,583,400
Sussex	$1,014,900	$722,600	$1,737,500
Teterboro	$176,156,300	$124,997,800	$301,154,100
Trenton Mercer	$107,132,900	$75,388,400	$182,521,300
Trenton-Robbinsville	$1,531,100	$1,090,100	$2,621,200
Trinca	$241,800	$172,200	$414,000
Vineland-Downstown	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Woodbine Municipal	$349,600	$248,900	$598,500
STATEWIDE TOTAL	**$521,557,500**	**$369,591,100**	**$891,148,600**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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TABLE 15

Economic Impact of General Aviation in New Jersey

GENERAL AVIATION VISITOR OUTPUT

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	$565,500	$603,000	$1,168,500
Alexandria Field	$697,500	$743,700	$1,441,200
Allaire	$6,487,500	$6,917,900	$13,405,400
Bader Field	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Blairstown	$1,983,800	$2,115,400	$4,099,200
Camden County	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Cape May County	$2,450,300	$2,612,900	$5,063,200
Cross Keys	$964,500	$1,028,500	$1,993,000
Essex County	$21,893,300	$23,345,700	$45,239,000
Flying W	$2.574,800	$2,745,700	$5,320,500
Greenwood Lake	$1,274,300	$1,358,800	$2,633,100
Hammonton Municipal	$959,300	$1,022,900	$1,982,200
Kupper	$2,241,800	$2,390,500	$4,632,300
Lakewood	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Lincoln Park	$955,500	$1,018,800	$1,974,300
Linden	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Marlboro	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Millville Municipal	$4,104,000	$4,376,300	$8,480,300
Morristown Municipal	$26,396,300	$28,147,500	$54,543,800
Ocean City Municipal	$2,852,300	$3,041,500	$5,893,800
Old Bridge	$90,000	$96,000	$186,000
Oldmans	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Other Airports	$513,800	$547,900	$1,061,700
Princeton	$1,885,500	$2,010,600	$3,896,100
Red Lion	$64,500	$68,800	$133,300
Robert J. Miller Airpark	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Sky Manor	$1,866,800	$1,990,600	$3,857,400
Solberg-Hunterdon	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Somerset	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
South Jersey Regional	$2,398,500	$2,557,600	$4,956,100
Sussex	$765,000	$815,700	$1,580,700
Teterboro	$76,718,300	$81,807,800	$158,526,100
Trenton Mercer	$17,130,000	$18,266,400	$35,396,400
Trenton-Robbinsville	$884,300	$943,000	$1,827,300
Trinca	$167,300	$178,400	$345,700
Vineland-Downstown	CONFIDENTIAL	CONFIDENTIAL	CONFIDENTIAL
Woodbine Municipal	$475,500	$507,000	$982,500
STATEWIDE TOTAL	**$198,140,600**	**$211,285,200**	**$409,425,800**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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TABLE 16

Economic Impact of General Aviation in New Jersey

TOTAL OUTPUT (VISITOR AND TENANT)

Airport	Direct Impact	Secondary Impact	Total Impact
Aeroflex-Andover	$2,011,500	$1,626,200	$3,637,700
Alexandria Field	$1,761,000	$1,500,800	$3,261,800
Allaire	$16,091,300	$13,755,400	$29,846,700
Bader Field	$951,500	$995,000	$1,946,500
Blairstown	$3,095,500	$2,906,900	$6,002,400
Camden County	$654,300	$609,100	$1,263,400
Cape May County	$8,295,300	$6,729,900	$15,025,200
Cross Keys	$2,406,800	$2,055,400	$4,462,200
Essex County	$32,977,900	$31,095,800	$64,073,700
Flying W	$4,512,400	$4,125,200	$8,637,600
Greenwood Lake	$2,124,600	$1,964,200	$4,088,800
Hammonton Municipal	$7,145,400	$5,427,100	$12,572,500
Kupper	$4,384,400	$3,915,900	$8,300,300
Lakewood	$2,655,300	$2,583,400	$5,238,700
Lincoln Park	$3,885,400	$3,104,700	$6,990,100
Linden	$5,305,800	$5,441,600	$10,747,400
Marlboro	$948,300	$930,100	$1,878,400
Millville Municipal	$107,537,700	$77,989,200	$185,526,900
Morristown Municipal	$89,886,400	$73,152,200	$163,038,600
Ocean City Municipal	$3,741,500	$3,661,300	$7,402,800
Old Bridge	$837,100	$627,900	$1,465,000
Oldmans	$273,300	$258,400	$531,700
Other Airports	$2,071,000	$1,656,500	$3,727,500
Princeton	$4,662,500	$3,987,700	$8,650,200
Red Lion	$498,500	$377,800	$876,300
Robert J. Miller Airpark	$3,909,200	$3,389,500	$7,298,700
Sky Manor	$3,949,700	$3,473,500	$7,423,200
Solberg-Hunterdon	$4,961,000	$5,006,700	$9,967,700
Somerset	$5,306,800	$5,210,500	$10,517,300
South Jersey Regional	$9,164,900	$7,374,600	$16,539,500
Sussex	$1,779,900	$1,538,300	$3,318,200
Teterboro	$252,874,600	$206,805,600	$459,680,200
Trenton Mercer	$124,262,900	$93,654,800	$217,917,700
Trenton-Robbinsville	$2,415,400	$2,033,100	$4,448,500
Trinca	$409,100	$350,600	$759,700
Vineland-Downstown	$1,124,800	$805,400	$1,930,200
Woodbine Municipal	$825,100	$755,900	$1,581,000
STATEWIDE TOTAL	**$719,698,100**	**$580,876,300**	**$1,300,574,400**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

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TABLE 17

Economic Impact of General Aviation in New Jersey

ON AIRPORT NON-AVIATION BUSINESS ECONOMIC IMPACTS

Airport	Number of on Airport Non-Aviation Businesses	Employment	Payroll	Output
Allaire	15	287	$10,915,700	$20,622,000
Blairstown	1	6	$237,600	$427,800
Cape May County	1	119.5	$4,732,200	$8,520,350
Cross Keys	1	19	$752,400	$1,354,700
Millville Municipal	20	808	$14,292,000	$57,610,400
South Jersey Regional	1	3.5	$138,600	$249,550
Trenton Mercer	2	18	$479,200	$1,152,600
Woodbine Municipal	1	6	$154,900	$454,900
TOTAL	**42**	**1,267**	**$31,702,600**	**$90,392,300**

Source: The Airport Technology and Planning Group, Inc. 01/19/96 estimated direct impact these non-aviation businesses provide. These non-aviation related tenants provide the following direct annual economic impacts:

- Non-aviation tenants located on the study airports create an estimated 1,270 jobs.
- These tenants have a combined annual payroll of $31.7 million.
- These tenants have a combined annual output of $90.4 million.

While, these economic impacts are noted in the airport-specific analysis discussed later in this report, they have not been added to the benefits derived from tenant and visitor-related activities. This is because it was assumed that these activities could in fact take place elsewhere in the community, they just happen to be located at the airport.

E. Economic Impact by Industry Sector

When the 1994 direct and secondary impacts from all on-Airport tenants and general aviation visitors are summed, the total economic benefit stemming from New Jersey's general aviation airports is quantified. In 1994, the total statewide employment attributable to general aviation airports in New Jersey was estimated at approximately 16,000 full-time positions; total annual payroll was estimated at $450.9 million; and total output was estimated at more than $1.3 billion. **Table 18** summarizes the combined economic impact for New Jersey's general aviation airport tenants and visitors.

This economic benefit through secondary impacts (the multiplier effect), provides a stimulus to almost every sector of the economy. As discussed, the industry sector for each airport's direct impact was gathered through surveys. For example, direct FBO impacts are in the transportation sector, direct airport management impacts are typically initiated in the construction sector, and visitor impacts begin in the trade and services sectors.

IMPLAN data allows the secondary impact associated with each major industry sector to be estimated. **Table 19** presents econometric modeling estimates of the inter-linked benefits that can be attributed to secondary impacts for each major industry sector. These sector specific estimates reflect a distribution of all secondary tenant and visitor benefits discussed previously. This table helps to illustrate the inter-dependence of the State's general aviation airports and the economy. This table is based on econometric modeling and should be used to understand the relative impacts and benefits experienced by each major sector of the economy as a result of the State's general aviation airports. Table 19 uses secondary impacts identified in Table 18 to estimate how tenant and visitor-related activities impact the economy.

TABLE 18

Economic Impact of General Aviation in New Jersey

STATEWIDE ECONOMIC IMPACT SUMMARY

	Direct	Secondary	Total
Employment			
Airport Tenants	3,931	3,654	7,585
GA Visitors	5,283	3,093	8,376
Total	**9,213**	**6,747**	**15,961**
Payroll			
Airport Tenants	$139,173,200	$96,570,200	$235,743,400
GA Visitors	$125,202,600	$89,946,800	$215,149,400
Total	**$264,375,800**	**$186,517,000**	**$450,892,800**
Output			
Airport Tenants	$521,557,500	$369,591,100	$891,148,600
GA Visitors	$198,140,600	$211,285,200	$409,425,800
Total	**$719,698,100**	**$580,876,300**	**$1,300,574,400**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

01/19/96

TABLE 19

Economic Impact of General Aviation in New Jersey

SECONDARY IMPACTS BY INDUSTRY

Industry Sector	Output	Payroll	Employment
Agriculture, Forestry, & Fisheries	$1,909,100	$437,800	27
Mining	$116,600	$48,000	1
Construction	$100,470,000	$32,832,600	1,096
Manufacturing	$103,598,700	$24,873,300	511
Transportation, Communication & Utilities.	$80,573,300	$17,489,900	518
Trade	$74,793,000	$27,650,400	1,857
Finance, Insurance, & Real Estate	$70,190,100	$24,153,600	370
Service	$144,230,100	$57,160,100	2,305
Government	$4,995,500	$1,871,400	62
TOTAL	**$580,876,300**	**$186,517,000**	**6,747**

Source: The Airport Technology and Planning Group, Inc.
New Jersey IMPLAN Multipliers

01/19/96

The majority of the 6,750 secondary jobs generated as a result of general aviation in the State can be attributed to the services and construction industry sectors. The services industry receives the single largest employment impact with the creation of more than 2,300 full-time jobs. Again, this is in addition to the direct jobs created as a result of general aviation visitors. Trade also benefits by the creation of approximately 1,860 positions. The construction sector also receives the benefit of nearly 1,100 full-time positions.

4. QUALITATIVE AIRPORT BENEFITS

While the previous section of this study focuses on the quantitative benefits resulting from general aviation in New Jersey, there are also a number of qualitative benefits that must be discussed when the total value of an airport or an airport system is analyzed. Qualitative benefits are those factors for which dollar values cannot be readily assigned. While it may be difficult to place a dollar value on such impacts, these benefits improve the quality of life, health, or welfare of the State's residents in a variety of ways. Among these benefits are activities such as medical flights, police patrol, firefighting, traffic reporting, education opportunities, agricultural operations, environmental observations and analysis, the arrival of high-profile visitors and government officials, and recreational benefits.

A key focus of the on-airport site visits and tenant surveys was to identify specific examples of qualitative benefits provided by each New Jersey airport. While the demographics of individual market areas and available facilities greatly influence each airport's ability to provide such benefits, each airport in the State's system of general aviation airports provides important qualitative benefits. **Exhibit 3** presents the specific benefits identified for each study airport. While this matrix is not all-encompassing, it does provide an important overview of the diversity of benefits general aviation provides to the State, beyond the creation of jobs, payroll, and output.

The qualitative benefits provided by New Jersey's general aviation airports are extensive and varied. The system as a whole provides innumerable recreational benefits. The park-like setting of many of the system airports is important to preserving green space and open areas in New Jersey. Within a State that is highly urbanized, this particular function is extremely beneficial. Many types of recreational flying, including hot air ballooning, glider operations, and parachuting, are accommodated at the airports.

New Jersey's general aviation airports are essential to providing adequate operational capacity in the region. Several of New Jersey's general aviation airports are designated by the FAA as relievers. Many of the region's commercial service airports have reached a level of operational demand that saturates a significant percentage of their operational capacity. Many of New Jersey's general aviation airports provide an alternative landing site for corporate, business, and a wide variety of smaller general aviation aircraft that would otherwise use an already congested commercial service airport. New Jersey has 14 FAA designated reliever airports. These airports are divided into two

	Recreational Flying	Ag Spraying	Cargo Activity	Forest Firefighting	Flight Training	Corporate/Business	Emergency Medical	Aerial Inspection	Police	Community Facilities	Prison Transport
Aeroflex-Andover	•			•	•	•	•	•			
Alexandria	•	•			•	•	•	•	•	•	
Allaire	•				•	•	•		•		•
Atlantic City Municipal-Bader Field	•					•	•	•			
Blairstown	•				•	•					
Camden County	•				•	•	•		•		
Cape May County	•				•	•					
Cross Keys	•				•	•	•	•	•		
Essex County	•		•		•	•	•	•	•		
Flying W	•				•	•				•	
Greenwood Lake	•	•		•	•	•	•	•	•		
Hackettstown	•				•						
Hammonton Municipal	•	•		•	•	•					
Kupper	•				•	•	•	•	•		•
Lakewood	•				•	•					
Lincoln Park	•				•	•	•				
Linden	•		•		•	•	•	•	•	•	•
Marlboro	•				•						
Mercer County	•		•		•	•	•	•	•		•
Millville Municipal	•	•		•	•	•	•		•		
Morristown Municipal	•		•		•	•	•	•	•		
Ocean City Municipal	•				•						
Old Bridge	•				•	•					
Oldmans	•				•			•			
Princeton	•	•		•	•	•	•	•	•		
Red Lion	•			•	•				•		
Robert J. Miller Airpark	•	•			•	•					
Sky Manor	•				•	•	•	•	•		
Solberg-Hunterdon	•			•	•	•	•	•			•
Somerset	•			•	•	•	•				
South Jersey Regional	•				•	•	•	•	•	•	•
Sussex	•	•		•	•	•	•	•	•		
Teterboro	•		•		•	•	•	•	•	•	•
Trenton-Robbinsville	•				•	•	•	•			
Trinca	•				•	•	•	•			
Vineland-Downstown	•	•		•				•			
Woodbine Municipal	•	•		•	•	•	•		•		

Additional Airport Benefits

Exhibit
3a

	Civil Air Patrol	Just-In-Time Goods	Open Space	Career Training/Education	Search and Rescue	Traffic/News	VIP Gateway	Aerial Photography	Museums	Real Estate
Aeroflex-Andover	•	•	•	•			•	•		
Alexandria			•	•		•		•		•
Allaire		•	•	•	•	•	•	•	•	
Atlantic City Municipal-Bader Field						•				
Blairstown			•							
Camden County										
Cape May County			•	•						•
Cross Keys	•		•	•			•	•		
Essex County			•	•		•	•	•		•
Flying W				•						
Greenwood Lake	•		•	•			•	•		•
Hackettstown										
Hammonton Municipal			•							
Kupper	•	•	•	•		•	•	•		
Lakewood	•									•
Lincoln Park			•							
Linden	•	•	•	•	•	•	•	•		•
Marlboro										
Mercer County	•	•		•		•	•	•		
Millville Municipal	•								•	
Morristown Municipal	•		•	•		•	•	•		
Ocean City Municipal			•			•	•	•		
Old Bridge										•
Oldmans		•								
Princeton	•		•	•		•	•	•		•
Red Lion							•	•		
Robert J. Miller Airpark			•							•
Sky Manor	•	•	•	•			•	•		
Solberg-Hunterdon			•	•		•	•	•		
Somerset			•	•			•	•		•
South Jersey Regional	•			•				•	•	
Sussex	•		•	•				•		•
Teterboro	•	•	•	•		•	•	•	•	
Trenton-Robbinsville						•		•		•
Trinca			•							
Vineland-Downstown			•					•		
Woodbine Municipal	•					•		•		•

Additional Airport Benefits

Exhibit 3b

tiers. The first tier is available to serve general aviation aircraft including business and corporate jets and larger twin engine aircraft. The second tier is available to serve smaller twin engine and single engine general aviation aircraft. By providing an alternative operating venue for general aviation aircraft, many of New Jersey's general aviation airports allow the region's commercial service airports to support increasing passenger and cargo volumes with the operating slots that are "freed" up by New Jersey's reliever airports.

New Jersey's general aviation airports support a number of aerial activities that help to enhance the quality of life for all New Jersey residents. Each year, many of New Jersey's general aviation airports serve as a base for agricultural spraying. Tens of thousands of acres of crop land are treated annually by aerial applications from crop dusters who rely on New Jersey's general aviation airports. The increased crop production that results from this spraying is, by itself, of significant economic value to the State. Spraying activities emanating from the general aviation airports are also used to treat forest lands throughout the State when disease or pests threaten. Many of New Jersey's general aviation airports also serve as a base for aerial forest fire fighting activities. This activity is important to protecting the State's environment and to preserving its quality of life.

Other types of aerial inspection activities are also facilitated by the State's general aviation airports. Pipelines are patrolled and various environmental inspections are supported by the airport system. Operators that use New Jersey's general aviation airports work hand-in-hand with the State's fishing industry to spot schools of fish. Many of the State's general aviation airports are then relied upon to ship these fish, as well as other just-in-time and/or perishable goods. New Jersey's general aviation airports are used to support news, traffic, and weather reporting in communities throughout the State. The general aviation airports enable both residential and commercial realtors to show prospective buyers a wide range of properties in an expanded geographical area in a short amount of time. With the advent of Geographic Information Systems (GIS), many communities have begun to keep integrated, computerized mapping of census, demographic, and infrastructure data. New Jersey's general aviation airports support the aerial photography which is needed for this mapping.

Many of New Jersey's general aviation airports are used by local, State, and Federal law enforcement agencies. Airports are used for traffic surveillance, drug enforcement, and prisoner transport. New Jersey's general aviation airports are also used routinely by the Civil Air Patrol. The Civil Air Patrol (CAP) is an aeronautical cadet program for young adults ages 13-21 and an official auxiliary of the U.S. Air Force. The cadets participate in search and rescue efforts, communications, damage assessment, dike construction, and disaster relief missions for other agencies such as FEMA and the Red Cross. The cadet program's goal is to provide an environment to motivate American youth to develop leadership qualities and to become responsible citizens through aviation-centered activities. Several of the State's general aviation airports are also used to support various search and rescue activities of the U.S. Coast Guard.

New Jersey's general aviation airports play an important role in aviation-related education and career training. This includes various levels of pilot training. Other general aviation airports help to preserve the nation's and State's aviation history and heritage through museums that they host or antique/vintage aircraft that they hangar.

New Jersey's general aviation airports are cognizant of their responsibility to be a good neighbor to the communities they serve. To this end, several of the larger general aviation airports have adopted published noise abatement procedures to mitigate adverse noise impacts emanating from aircraft operations. Several airports host community services and facilities at no charge to the local community, while almost all general aviation airports in New Jersey open their doors to host charitable and community fund-raising events.

As documented by this study, New Jersey's business community also relies extensively on the State's system of general aviation airports. The New Jersey general aviation airports allow all employers in the State to reach markets that are not served by scheduled air carrier service. The general aviation airports allow many companies to expand their market areas by reducing travel times. General aviation airports in New Jersey increase the productivity and flexibility of businesses in the State. Top executives can reduce travel time via corporate aircraft, and many businesses can operate more efficiently by controlling their inventories through the shipment and receipt of just-in-time parts, products, and supplies. Many high-profile and VIP visitors to New Jersey prefer to use general aviation aircraft, as opposed to traveling via the commercial airlines.

Finally, New Jersey's general aviation airports are used by physicians, medical centers, and hospitals throughout the State. Patients and accident victims are routinely transported via many of New Jersey's general aviation airports. Human organs are both shipped and received via the general aviation airports in New Jersey, as are medical supplies and equipment.

These notable health, welfare, and social benefits are in addition to the previously documented, far-reaching economic benefits that emanate from the day-to-day operation of New Jersey's system of general aviation airports.

5. BUSINESS USE OF NEW JERSEY AIRPORTS

In addition to the various employers in the State (i.e., hotels, motels, restaurants, and on-airport tenants) whose prosperity can be directly correlated to the airports in this analysis, there are other non-aviation businesses in New Jersey that depend on general aviation airports. Without these general aviation airports, the employment and sales of many firms in the State would be adversely impacted. The final step in the economic impact analysis for the study airports was to identify the interdependence between general aviation and businesses in New Jersey.

Many businesses throughout the U.S. depend on general aviation aircraft to add to their productivity and efficiency. Previous sections of this economic impact and benefits analysis have quantified the economic benefits associated with the activities of aviation-related on-airport tenant and visitors who arrive in the State via general aviation aircraft. The qualitative health, welfare, and social benefits of New Jersey's system of general aviation airports have also been highlighted. But these measures alone do not represent the full spectrum of benefits that the State derives from the day-to-day operation of its general aviation airport system. Many employers are the benefactors of valued-added benefits that result from the increased efficiency of air travel. This section discusses these additional non-aviation business-related jobs in New Jersey that benefit from the operation of the system of general aviation airports.

Many of the nation's leading employers that use general aviation as a business tool are members of the National Business Aircraft Association (NBAA). Data from NBAA shows that many top U.S. businesses use general aviation aircraft. In 1992, 88 percent of all businesses included in the *Fortune 500* "Honor Roll" operated general aviation aircraft. By 1994, the percentage for this prestigious group of employers increased to 90 percent. NBAA also reports that in 1994, 94 percent of the *Forbes* "Top 50" (ranked by market value) companies operated general aviation aircraft. Of *USA Today*'s "Top 10 Total Quality Management Companies," all (100 percent) operated general aviation aircraft.

Business use of general aviation aircraft can range from the rental of small single-engine aircraft operation to multiple aircraft corporate fleets that are supported by dedicated flight crews and mechanics. The use of general aviation aircraft allows employers to efficiently transport priority personnel and air cargo. Businesses use general aviation aircraft to link multiple office locations and to reach existing and potential customers. The use of business aircraft by smaller companies has escalated as various chartering, leasing, time-sharing, interchange agreements, partnerships, and management contracts have emerged.

Regardless of how the aircraft are owned or what type of aircraft is flown, businesses choose to use general aviation because it provides safe, efficient, flexible, and reliable transportation. Of all the benefits provided to business by general aviation, flexibility is the highest ranked factor by all businesses using general aviation aircraft. While there are many reasons that businesses use general aviation in their day-to-day operation, the top 10 factors, according to the businesses themselves, are as follows:

- Flexibility
- Time Savings
- Reliability
- Safety
- Improved Marketing Efficiency
- Facility/Branch Office Control
- Personnel Development/Training
- Privacy and Comfort
- Efficiency
- Security

The use of general aviation as a business tool adds to productivity and to the bottom line. According to an NBAA survey of key *Forbes* and *Fortune 500* companies, those businesses who use general aviation aircraft routinely and significantly outperform businesses who do not use general aviation aircraft. Performance indicators such as annual sales, number of employees, value of assets, and annual income are significantly higher for employers using general aviation aircraft.

Many employers in New Jersey benefit from the State's system of general aviation airports. Without the availability of the general aviation airport system, employment levels for many employers in the State could be adversely impacted. Because of the efficiencies gained through the use of general aviation aircraft, many businesses in the State receive a value-added employment benefit. This section identifies the additional value-added benefit that New Jersey employers derive from the day-to-day operation of New Jersey's general aviation airport system.

Approximately 5,000 businesses throughout the State were surveyed to assess their dependence on aviation. (Appendix A contains an example of this survey.) The business list for this survey was obtained from Harris Publishing. This list was supplemented with data provided by various airport managers.

Several questions in the survey were oriented toward business use of aviation facilities such as reliance on general aviation, use of air express/cargo services, and requirements for company-owned general aviation aircraft. The survey sampled all types of businesses in the State, however, the sample targeted businesses who have the propensity to use general aviation.

There are many businesses in the State that depend on the system of general aviation airports on a day-to-day basis. Without access to general aviation airports, there are companies that would be forced to cut employment or possibly even to relocate. Approximately 54 percent of all the survey respondents indicated that their company owns, leases, or charters general aviation aircraft. Over 42 percent of the respondents indicated that they have customers or suppliers who travel by general aviation to visit the surveyed company. These statistics provide some detail as to the importance that general aviation has for New Jersey's business community.

According to data gathered from the aircraft owners survey, approximately 57 percent of all business flights by New Jersey businesses are to destinations out-of-state. The other 43 percent of the business operations are to New Jersey airports. This indicates a significant percentage of the value-added benefit that businesses in the State receive from general aviation can be attributed to the system of airports rather than one individual or particular airport.

To estimate the Statewide dependence on New Jersey's system of general aviation airports, each business questioned as part of the non-aviation business survey was asked to provide information regarding its reliance on general aviation for employment and sales. Considering the number and variety of businesses in the State, it is impossible to make exact estimates of the value-added benefit that New Jersey businesses derive from the use of the system of general aviation airports. It is possible, however, to make several broad assumptions as to general aviation's importance to non-aviation businesses. In order to relate the survey sample to the entire business population of the State, the survey data was assumed to be representative of all employers statewide.

Each respondent to the non-aviation business survey was asked to estimate the percentage of employment reduction they would anticipate if, for some reason, general aviation airports ceased to operate. Statewide, employers estimated a 1.47 percent reduction in their current employment levels without general aviation services. This employment reduction was then applied to the State's total employment of 3.7 million to provide an estimate of the value added to Statewide employment related to general aviation airports. Using this approach, it is estimated that total value-added employment for non-aviation businesses in New Jersey related to the existence of general aviation airports is approximately 54,700 full-time positions. By applying the average State salary to this number of employees, a payroll impact of more than $1.95 billion is indicated. In order to estimate the output generated by these value-added employees, a ratio of the State's gross state product (GSP) to total New Jersey employment was used. By dividing GSP by statewide employment, an output level of approximately $60,000 per worker is obtained. Multiplying 54,700 positions by $60,000 indicates that general aviation activity in the State produces an output impact of more than $3.28 billion dollars. Again, this level of impact is a result of the operation of the entire system of general aviation airports and cannot be attributed to individual facilities.

The final section of the business survey asked respondents to rank the importance of various factors that they consider if they are contemplating relocating or expanding. Overall, the availability of a commercial service airport ranked 4th and proximity to general aviation facilities ranked 9th out of all factors considered. Labor supply, highway access, and tax incentives ranked first, second, and third, respectively. The top 10 rankings are as follows:

- Available labor supply
- Convenient highway access
- Tax incentives
- Commercial service airport
- Proximity to suppliers
- Raw materials
- Academic or cultural centers
- Climate
- General aviation airport
- Urban business district

While proximity to a general aviation airport ranked ninth, 42 percent of all respondents indicated that such a facility was "Essential" or "Important" to their locational decision. In addition, approximately 42 percent of all the companies responding to the survey indicated that they have customers or suppliers that use general aviation facilities. These statistics indicate that while proximity to a general aviation facility may not be the most important locational factor for many

New Jersey businesses, a high percentage of State businesses directly benefit from general aviation airports.

The overall results of the business survey may be summarized as follows:

- Over 63 percent of the respondents classified their industry as manufacturing. Transportation industries accounted for approximately 9 percent of the returned surveys.
- Approximately 26 percent of the survey respondents indicated they use general aviation aircraft (owning, leasing, or chartering) related to their general business activities.
- Over 42 percent of the responding businesses indicated that they have customers or suppliers who rely on general aviation when conducting business with their company.
- Employers indicated that, without the State's general aviation airports, total employment would be reduced by 1.47 percent. This value-added impact is responsible for approximately 54,700 full-time positions with a payroll in excess of $1.95 billion.
- Approximately 42 percent of all respondents indicated that a general aviation facility was "Essential" or "Important" to their locational decision.

6. ECONOMIC IMPACTS BY AIRPORT

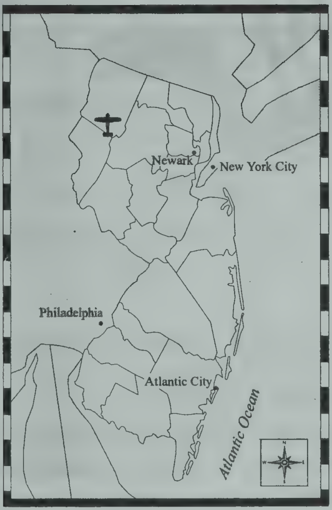
The economic impact analysis has demonstrated the significant contribution that the New Jersey airports make to the State economy. The airports act as economic catalysts throughout the State, supporting direct as well as spin-off employment, payroll, and output. Further, as identified through this study's business survey, businesses throughout the State rely on the availability of general aviation airports. The following section presents the individual impact that each of the study's airports provides. As discussed, impacts are presented for employment, payroll, and output. In addition, qualitative benefits provided by each airport are noted. Individual airports are presented in alphabetical order.

AIRPORT LOCATION

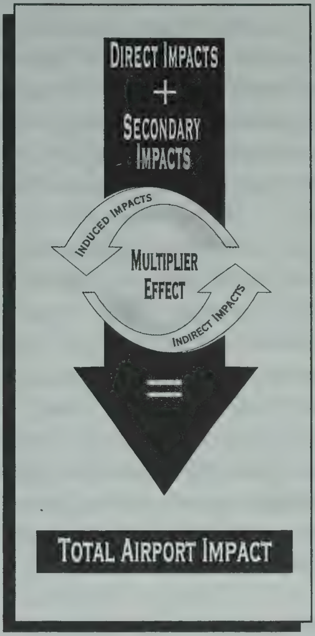
The Aeroflex-Andover Airport is situated in the upper northwest corner of New Jersey. The airport is located in Andover Township, in Sussex County, and lies 56 miles west of New York City. The airport is located two miles north of Andover, and it is surrounded by a State park and two lakes. This setting, together with the low traffic volume in the area, makes the airport an ideal training site for novice pilots and weekend flyers.

The airport has more than 50 based aircraft, with 23,000 annual operations. The airport is owned and operated by the State of New Jersey Forest Fire Service and is zoned as a State park. The Aeroflex-Andover Airport plays an integral part in New Jersey's preparedness when handling forest fires.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Aeroflex-Andover Airport has a single runway with a nonprecision circling approach (VOR A), medium intensity runway lighting (MIRL), and a full-length taxiway. Runway 3/21 has a length of 1,981 feet. The airport has a full-service FBO who offers fuel (100LL), maintenance, flight instruction, tie-downs, and hangar space.

DIRECT IMPACTS

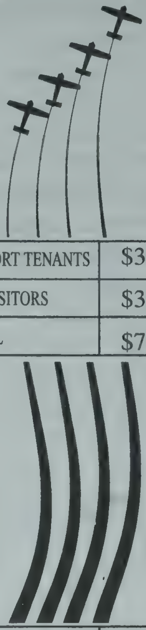
In 1994, there were six aviation-related tenants on the airport who supported 12 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $1.4 million annually. The estimated direct annual payroll of these tenants is $343,000. Survey data indicated that approximately 3,800 visitors used the airport in 1994. Approximately 10 percent of these visitors used the airport for business travel, while 90 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $565,500. This visitor related output (spending) supported an additional 15 full-time jobs for employees earning $357,000 annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	12.0	11.2	23.2
GA VISITORS	15.1	8.8	23.9
TOTAL	27.1	20.0	47.1



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$343,000	$237,000	$580,000
GA VISITORS	$357,000	$257,000	$615,100
TOTAL	$700,900	$494,200	$1,195,100

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$1,446,000	$1,023,200	$2,469,200
GA VISITORS	$565,500	$603,000	$1,168,500
TOTAL	$2,011,500	$1,626,200	$3,637,700

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Aeroflex-Andover Airport was approximately $3.6 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at approximately 47 persons, with a total annual payroll (direct and secondary) of approximately $1.2 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses occasionally use the Aeroflex-Andover Airport. Information from the business, visitor, and aircraft owner surveys reveals the service and professional service industries are the top business users of the airport. Data from the visitor survey indicate that pilots base their aircraft at the Aeroflex-Andover Airport as an alternative to larger airports. Due to the size and nature of the airport, use by large corporations is minimal, although the airport is utilized by independent and small businesses. Individuals surveyed stated that the airport helps their business in a variety of ways. The most noted of these ways include faster travel, more economical travel than scheduled airline service, and the ability to respond rapidly to customer emergencies.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. At Aeroflex-Andover Airport, the types of activities that occur on a regular basis include flight instruction and recreational flying. In addition, Robinson Aerial Surveys, an aerial photography firm, is on-call for immediate response for photography of any emergency situation (i.e., environmental control, spills, fires, etc.).

While Aeroflex-Andover Airport serves the recreational and small business pilot, the airport plays a significant role as an air attack base for the fire suppression activities of the New Jersey Forest Fire Service. The airport is base to two Grumman AG-CAT aircraft; each has the capacity to drop 270 gallons of Class A biodegradable foam. One UH1 Huey, which has the capacity to drop 325 gallons of water, is also based at the airport. The airport is adjacent to two lakes which is ideal for water refill. Fire suppression aircraft are dispatched to more than 100 fires annually throughout the forests, parks, and Pine Barrens of New Jersey.

Aeroflex-Andover Airport recognizes that today's airport must be a safe, efficient, and multi-purpose facility which also maintains community compatibility. Improvement plans for the airport are geared toward land use compatibility and include the development of revenue-generating attractions such as adjacent camping and an equestrian facility. The airport plays a major role in supporting New Jersey's parks and Forest Fire Service, contributing to the State's overall quality of life and to the preservation of New Jersey's green space.

Aeroflex-Andover Airport's future growth is limited for two main reasons. First, the airport is situated between two lakes, one on each end of the runway, which prohibits expansion of the runway. The second reason is that the airport has an agreement with the community of Andover that it will not expand.

SUMMARY

On an annual basis, Aeroflex-Andover Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
47	$1.2 million	$3.6 million

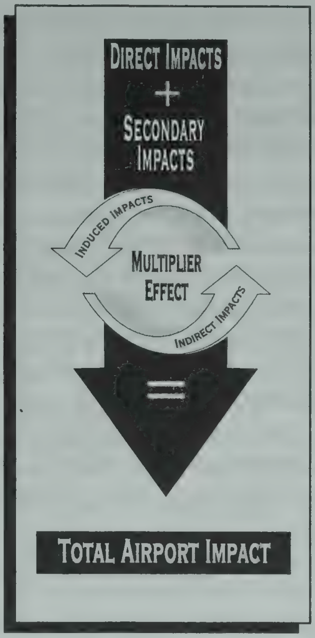
AIRPORT LOCATION

Alexandria Field is situated in Hunterdon County, 15 miles east of Easton, Pennsylvania and five miles south of Interstate Highway 78. The airport is located in Alexandria Township, New Jersey. Hunterdon County is situated halfway between New York City and Philadelphia. The county is bisected by Interstate Highway 78, allowing easy access to Newark International Airport and Port Elizabeth. Recent highway development has given Hunterdon County a high degree of accessibility to the East Coast megalopolis and, thereby, to national business centers.

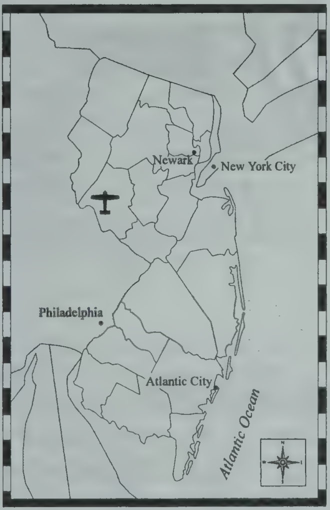
Built more than 50 years ago, Alexandria Field is a privately-owned, public-use general aviation airport that serves central New Jersey. While the airport's pastoral setting lends itself well to recreational and student flying, its proximity to tourist attractions such as Frenchtown and Lambertville makes the airport a valuable transportation asset for nearby businesses.

Alexandria Field, with approximately 93 based aircraft, experiences over 45,000 annual operations. The airport encompasses approximately 70 acres of land and has two main runways. Runway 8/26 is 2,550 feet in length, while Runway 13/31 is 1,810 feet in length. Runway 8/26 has a nonprecision approach (VOR RWY 8) and medium intensity runway lighting (MIRL), while Runway 13/31 has a visual approach.

IDENTIFYING ECONOMIC IMPACTS



LOCATION MAP



Direct Impacts

In 1994, there were six aviation-related tenants on the airport who supported over 20 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $1.1 million annually. The estimated direct annual payroll of these tenants is $326,400. Survey data indicated that approximately 4,200 visitors used the airport in 1994. Approximately 20 percent of these visitors used the airport for business travel, while 80 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $697,500. This visitor related output (spending) supported an additional 19 full-time jobs for employees earning $440,800 annually.

Secondary Impacts

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	20	19.6	39.6
GA VISITORS	18.6	10.9	29.5
TOTAL	38.6	30.5	69.1

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$326,400	$224,500	$550,900
GA VISITORS	$440,800	$316,700	$757,500
TOTAL	$767,200	$541,200	$1,308,400

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$1,063,500	$757,100	$1,820,600
GA VISITORS	$697,500	$743,700	$1,441,200
TOTAL	$1,761,000	$1,500,800	$3,261,800

Total Impacts

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Alexandria Field was approximately $3.3 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at about 69 persons, with a total annual payroll (direct and secondary) of approximately $1.3 million associated with these jobs.

Other Benefits

Data supplied by this study's survey efforts indicate that although Alexandria Field is mainly used by recreational flyers, it is occasionally used by businesses. Information from the business, visitor, and aircraft owner surveys reveals that agriculture and service industries use the airport for business. The companies flying into the airport are located mainly in the northeastern United States. Some of the more notable companies using the airport for business include Hitran Corporation, Koh-I-Noor Incorporated, and smaller independent businesses. Incoming businesses indicate that the airport is helpful because it allows them to reduce time during travel, and it provides a more efficient way of transporting goods and personnel.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. Alexandria Field sponsors "The Magic of Alexandria," a balloon festival that is responsible for attracting tens of thousands of people to the area. The festival is a main contributor to the growth of the airport. In addition to the balloon festival, the airport offers flight instruction and is home base for more than 90 aircraft.

The Alexandria Field serves as a site for significant aviation-related support facilities and services such as Federal Aviation Regulation Part 135 air taxi/commuter flight operations and beginning and advanced flight instruction for future pilots.

Some of the more elusive, yet beneficial, uses of the aircraft based at this airport include a Robinson R22 helicopter operation which provides various flight services for scenic tours; real estate inspection; aerial photography; construction job surveys; surveillance of power lines, pipelines, and fiber-optics; and news and traffic reporting.

Alexandria Field's owners are very dedicated to the recreational flyer; with tourism being New Jersey's second largest industry, the airport meets this market's needs. The airport is situated in a great location, with New York City less than one hour's drive away and tremendous local scenery just minutes away by plane. Airport management has indicated a desire to develop a residential airpark in association with the airport.

Summary

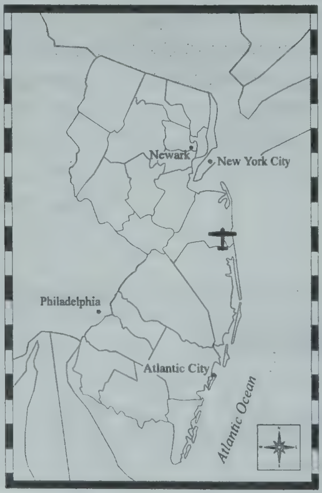
On an annual basis, Alexandria Field's tenants and visitors provide the following total benefits:

Jobs	Payroll	Output/Spending
70	$1.3 million	$3.3 million

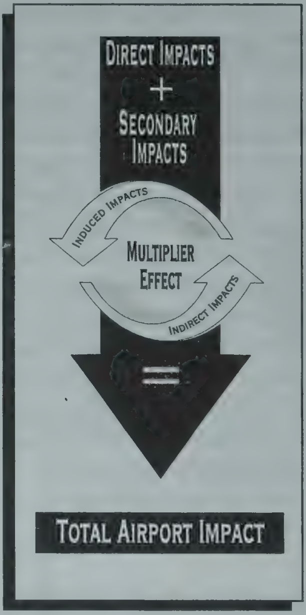
Airport Location

Allaire Airport is located in Monmouth County near the junction of Interstate Highway 195 (I-195) and the Garden State Parkway. The airport, a designated reliever, is the largest (850 acres) privately-owned, privately-funded, public-use facility in New Jersey. Philadelphia is located approximately one hour and 15 minutes away, while New York City is an hour's drive north. The airfield is located five miles from Jersey Shore resort areas such as Avon-by-the-Sea, Belmar, and Spring Lake. The airport is in proximity to an abundance of tourist attractions and activities such as the Atlantic Ocean beaches, boardwalk amusement parks, the Freehold Raceway, Monmouth Park, Wall Stadium, nine prestigious golf courses, 25 parks and conservation areas, and three flea and farmers' markets. The airport's location makes it a valuable transportation asset for visitors and nearby businesses.

Location Map



Identifying Economic Impacts



Allaire Airport's airfield is comprised of two runways. The airfield accommodates over 173,000 annual operations; approximately 30 percent of these are itinerant operations. Nearly 275 aircraft are based at the airport, including almost 60 multi-engine aircraft. The primary runway, Runway 14/32, is 7,000 feet in length, while Runway 3/21 is 3,500 feet in length. Runway 14/32 is equipped with medium intensity runway lighting (MIRL) and a nonprecision approach (LOC/DME RWY 14). The airport is served by a nonprecision circling approach (VOR A). The airport is also outfitted with an Automated Weather Observation Station (AWOS). Planned improvements for the airfield include widening the primary runway from 80 to 100 feet.

DIRECT IMPACTS

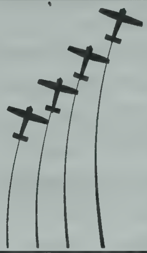
In 1994, there were 12 aviation-related tenants on the airport who supported over 98 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $9.6 million annually. The estimated direct annual payroll of these tenants is $2.6 million. Survey data indicated that approximately 27,800 visitors used the airport in 1994. Approximately 70 percent of these visitors used the airport for business travel, while 30 percent used the airport for personal use. This visitor related output (spending) supported an additional 173 full-time jobs for employees earning $4.1 million annually. Direct output from general aviation visitors is estimated at an annual $6.5 million.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	98.5	96.6	195.1
GA VISITORS	173.0	101.3	274.3
TOTAL	271.5	197.9	469.4



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$2,607,900	$1,793,600	$4,401,500
GA VISITORS	$4,100,100	$2,945,600	$7,045,700
TOTAL	$6,708,000	$4,739,200	$11,447,200

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$9,603,800	$6,837,500	$16,441,300
GA VISITORS	$6,487,500	$6,917,900	$13,405,400
TOTAL	$16,091,300	$13,755,400	$29,846,700

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Allaire Airport was approximately $29.8 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 469 persons, with a total annual payroll (direct and secondary) of approximately $11.4 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate that Allaire Airport is primarily used by businesses as a reliever airport for the airports serving Newark and Teterboro. Information from the business, visitor, and aircraft owner surveys reveals that the top business users of the airport fall into the following classifications: transportation, manufacturing, and financial. Businesses that fly into Allaire Airport are most often located in Pennsylvania, New York, and Florida. Companies flying into New Jersey via Allaire Airport to conduct business include Air Charter Service; Edward Cook Agency, Inc.; and Kennedy Cable Construction. Businesses flying into the airport are conducting business with firms such as Monmouth Cablevision, Performance Insurance Company, Hershey, AT&T, JCP&L, Kaiser, and Pfizer Corporation. Data from the business, visitor, and aircraft owner surveys indicate that Allaire Airport is important to the respondents' ability to decrease travel time, increase flexibility during business trips, increase productivity, and increase client interaction. Monmouth County is experiencing employment diversification and development, and the airport has experienced considerable growth in business and corporate aircraft activity.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The types of activities that occur at Allaire Airport on a regular basis are flight training, recreational flying, emergency medical transportation, and transportation for incoming government personnel. The airport has Part 135 air taxi operators, and it hosts FAA pilot safety programs and proficiency seminars. The New Jersey State Police use the Allaire Airport, as does the trauma unit of the Jersey Shore Medical Center. The medical center uses the airport for air ambulance services and for transporting vital human organs.

Some of the more elusive, yet beneficial, activities at the airport include two aerial advertising and banner towing operations. Aerial Sign, one of the largest aerial advertising firms in the country, has 21 aircraft based at Allaire Airport. As many as 15 to 20 aircraft are dispatched on Saturdays and Sundays through the summer months. Also, Allaire Airport is base for seven aircraft used exclusively for assisting the fishing industry to spot schools of fish, allowing fisherman to supply the region's restaurants and markets with fresh fish.

Allaire Airport encourages community involvement and is an active member of its neighboring communities. The airport has opened its doors for events, community support activities, and educational facilities that benefit all the citizens and visitors to Monmouth County. The airport is the selected site for a new Air Museum which will ultimately display antique and classic aircraft.

Allaire Airport shows potential for future growth due to excellent highway access, increases in local population, and developable land near the airport. Allaire

Airport recognizes that today's airport must be a safe facility that maintains community compatibility. The airport's master plan provides guidelines for future development which are geared toward attracting corporations.

In addition to the aviation-related and visitor impacts previously noted, the Allaire Airport supports an active business park. There are 15 non-aviation-related businesses in this complex that support 285 additional jobs. These jobs have an estimated annual payroll of $10.9 million. Annual spending/ sales by these companies is estimated at $20 million. These benefits are in addition to those noted for airport tenants and visitors. The airport plays a major role in the economic future of Monmouth County as it experiences diversification.

SUMMARY

On an annual basis, Allaire Airport's tenants and visitors provide the following total benefits:

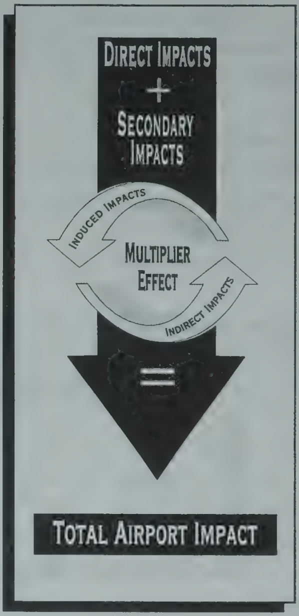
JOBS	PAYROLL	OUTPUT/SPENDING
469	**$11.4 million**	**$29.8 million**

AIRPORT LOCATION

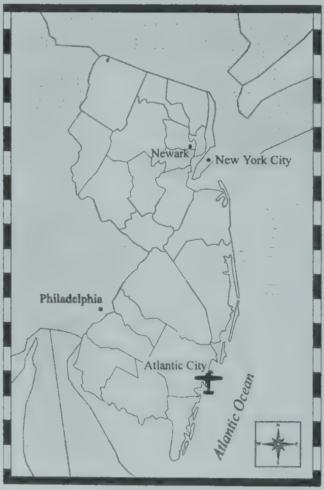
Atlantic City Municipal-Bader Field is located in the southeastern part of the State of New Jersey, approximately eight blocks from the Atlantic City Boardwalk. The airport is situated in Atlantic County and lies approximately 60 miles east of Philadelphia. Highway access to the airport is available from the Atlantic City Expressway, State Route 322, and State Route 40. The airport is located eight miles east of Exit 38 on the Garden State Parkway. Philadelphia is located approximately 60 minutes away; New York is a two-hour drive to the north; and Newark is situated one hour and forty-five minutes north of the airport. Atlantic City is served by numerous bus and rail lines.

Atlantic City Municipal-Bader Field is owned by Atlantic City. The airport has approximately five based aircraft and over 25,000 operations annually. The airport's facilities are comprised of two runways. Runway 11/29, the main runway, is 2,830 feet long and 100 feet wide, while Runway 4/22 measures 2,596 feet long and 100 feet wide. Runway 11/29 is outfitted with a nonprecision instrument approach (VOR RWY 11) and high intensity runway lighting (HIRL). Runway 4/22 is outfitted with a visual approach and medium intensity runway lighting (MIRL). It should be noted that Runway 4 is closed for landing and Runway 22 is closed for takeoff. The airport is served by two additional nonprecision circling approaches (VOR A and VOR B). The airfield offers no services.

IDENTIFYING ECONOMIC IMPACTS



LOCATION MAP



DIRECT IMPACTS

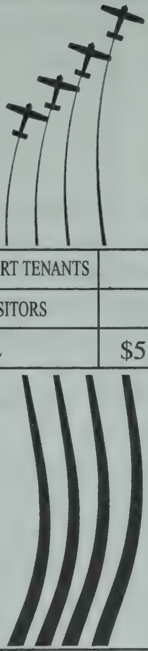
In 1994, the only aviation-related tenant associated with the airport was Johnson Controls, Inc. Johnson Controls, Inc. was contracted by Atlantic City to operate both Atlantic City International Airport and Atlantic City Municipal-Bader Field. A small amount of their labor force was used to manage and maintain Atlantic City Municipal-Bader Field. In order to preserve tenant confidentiality, total tenant and visitor impacts have been combined. This tenant's direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total combined direct output stemming from the tenant and general aviation visitors at Atlantic City Municipal-Bader Field was approximately $951,500. Total direct full-time employment related to airport tenants and general aviation visitors, is estimated at 25 persons, with a total direct payroll of approximately $581,800, annually. Survey data indicated that approximately 6,100 visitors used the airport in 1994. Approximately 10 percent of these visitors used the airport for business travel, while 90 percent used the airport for personal use.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	0.5	0.9	1.9
GA VISITORS	24.0	14.0	38.0
TOTAL	24.5	14.9	39.9



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$581,800	$418,000	$999,800

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$951,500	$995,000	$1,946,500

Total Impacts

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Atlantic City Municipal-Bader Field is approximately $1.9 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 40 persons, the total annual payroll (direct and secondary) associated with these jobs is estimated at $999,800.

Other Benefits

Discussions with airport personnel and the local pilots indicated that Atlantic City Municipal-Bader Field is used by both the recreational pilot and the business user. The Atlantic City Boardwalk is known around the country for its casinos, hotels, and convention centers. Incoming visitors have indicated that the ideal location of the airport, only six blocks from the Boardwalk, reduces travel time and provides a much more efficient way to transport personnel. Many of the airport's 25,000 operations are generated from helicopter charters transporting gamblers and casino executives into the area.

The airport means more to the city than just a way to bring additional visitors into the area. The airport has been used for emergency medical transports, news reporting, and for aircraft performing aerial inspections.

Currently, the city is planning a new convention center with over 600,000 square feet of exhibition space and a $52 million outdoor outlet mall and recreational area. These developments should help attract future travel into Atlantic City Municipal-Bader Field.

Summary

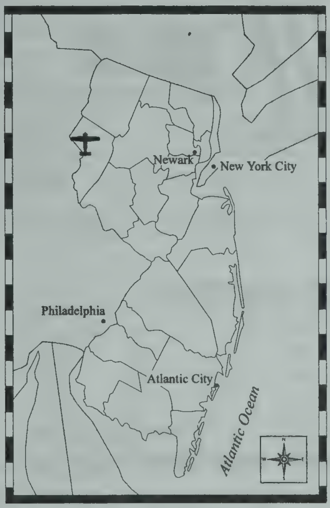
On an annual basis, Atlantic City Municipal-Bader Field's tenants and visitors provide the following total benefits:

Jobs	Payroll	Output/Spending
40	**$999,800**	**$1.9 million**

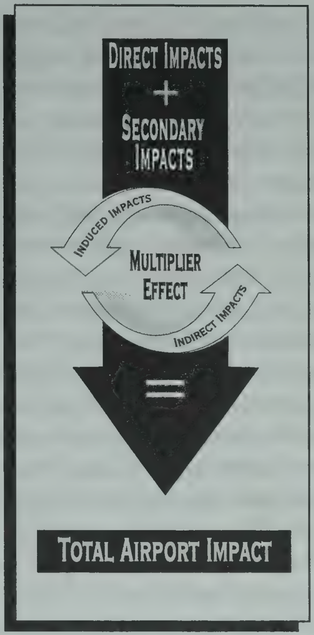
AIRPORT LOCATION

Blairstown Airport is located in Warren County, eight miles from the Delaware Water Gap and 10 miles from Pennsylvania. The airport is situated two miles southwest of Blairstown, New Jersey. Two major interstate highways, I-80 and I-78, cross the county in an east-west direction. In addition, an extensive State and county road system keeps Warren County "well connected" to major metropolitan markets such as New York City and Philadelphia. The airport's well-maintained and attractive rural setting, together with its low traffic volume, make the airport an ideal training site for novice pilots and the weekend flyer. The airport's proximity to tourist attractions and activities such as the Appalachian and Paulinskill Trails and the Water Gap Recreational Area makes the airport a valuable transportation asset for visitors and nearby businesses.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Situated on 200 acres, Blairstown Airport is privately owned. The airport is home base to 137 aircraft and approximately 50,000 annual operations. Runway 7/25 measures 3,100 feet long and 55 feet wide. A full-length taxiway serves the runway. The airport is equipped with a nonprecision approach (VOR RWY 25) and medium intensity runway lighting (MIRL). The airport has no current plans for expansion.

DIRECT IMPACTS

In 1994, there were four aviation-related tenants on the airport who supported over 16 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $1.1 million annually. The estimated direct annual payroll of these tenants is $368,200. Survey data indicated that approximately10,900 visitors used the airport in 1994. Approximately 30 percent of these visitors used the airport for business travel, while 70 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $2.0 million. This visitor related output (spending) supported an additional 53 full-time jobs for employees earning $1.3 million.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	16.5	16.2	32.7
GA VISITORS	52.9	31	83.9
TOTAL	69.4	47.2	116.6

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$ 368,200	$253,200	$ 621,400
GA VISITORS	$1,253,700	$900,700	$2,154,400
TOTAL	$1,621,900	$1,153,900	$2,775,800

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$1,111,700	$791,500	$1,903,200
GA VISITORS	$1,983,800	$2,115,400	$4,099,200
TOTAL	$3,095,500	$2,906,900	$6,002,400

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Blairstown Airport was approximately $6 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 117 persons, with a total annual payroll (direct and secondary) of approximately $2.8 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses occasionally use the Blairstown Airport. Information from the business, visitor, and aircraft owner surveys reveals that retail and manufacturing industries are the top business users of the airport. Data from the visitor survey indicate that pilots base their aircraft at the Blairstown Airport as an alternative to larger airports. Due to the size and nature of the airport, use by large corporations is minimal, although the airport is utilized by independent and small businesses. Individuals surveyed stated that the airport helps their business in variety of ways. The most noted of these ways include faster travel, less expensive travel than scheduled airline service, and the ability to interact with more clients in less time.

In addition to the previously noted aviation-related tenant and visitor impacts, the Blairstown Airport also has one additional tenant whose activities are not dependent on the airport. This one additional non-aviation tenant supports six additional on-site jobs. The annual payroll associated with these jobs is $237,600; these tenants have a total annual output of $1,427,800.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The types of activities that occur at Blairstown Airport on a regular basis include airplane and glider instruction, recreational flying, and dining at the airport restaurant. The airport also supports aerobatic activity. The Blairstown Airport supports a large number of antique/classic aircraft, thereby contributing to the preservation of our nation's aviation history.

The airport is mainly used by recreational aviators. The growth of the airport is directly linked to the growth of Warren County. In recent years, the county's population has remained steady and has not provided an opportunity to recruit additional pilots, therefore, limiting the airport's potential growth capabilities.

SUMMARY

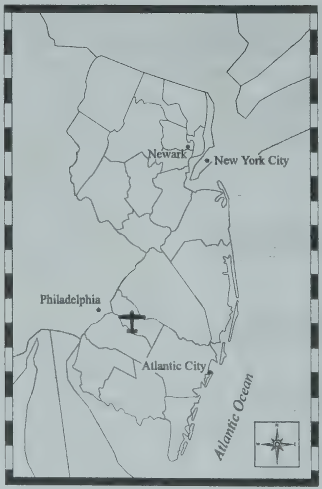
On an annual basis, Blairtown Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
117	$2.8 million	$6.0 million

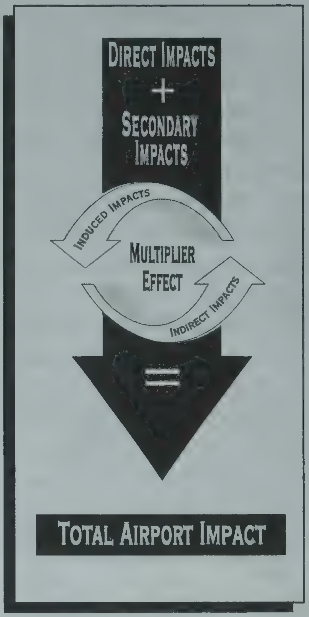
AIRPORT LOCATION

Camden County Airport is located in Winslow Township, New Jersey, in the eastern portion of the greater Philadelphia metropolitan area. Camden County Airport is a public-use general aviation airport owned and operated by Garden State Flying Service, Inc. The airport is the only airport in Camden County. Winslow Township is the home of the airport. Camden County Airport is located eight miles east of the busiest highway in the country, the New Jersey Turnpike. The highway provides direct access to New York City and Washington, D.C. Located 10 miles from the airport is Camden County's deep water harbor, shipping facilities, and warehouses which have the ability to handle every type of cargo. The port handles more international cargo than any other port in the North Atlantic region.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



The airport has 51 based aircraft and experiences approximately 23,500 annual operations. The airport's runway, Runway 5/23, measures 3,102 feet in length and is equipped with a nonprecision circling approach. Navigational aids include low intensity runway lighting (LIRL) and runway end identifier lights (REILs) for Runway 23.

Future plans for the airport include taxiway paving and construction of a 10-unit T-hangar. In addition, the runway is scheduled to be repaved in 1996.

DIRECT IMPACTS

In 1994, there was one aviation-related tenant on the airport. In order to preserve this tenant's confidentiality, total tenant and visitor impacts have been combined. This tenants' direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total direct output stemming from the on-airport tenant and general aviation visitors at Camden County Airport was approximately $654,300. Total full-time employment related to the airport tenant and general aviation visitors, including all secondary impacts, is estimated at 19 persons, with a total direct payroll of approximately $456,000 annually. Survey data indicated that approximately 1,900 visitors used the airport in 1994. Approximately 50 percent of these visitors used the airport for business travel, while 50 percent used the airport for personal use.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	8.5	8.3	16.8
GA VISITORS	10.8	6.4	17.1
TOTAL	19.3	14.7	34.0

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$456,000	$321,400	$777,400

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$654,300	$609,100	$1,263,400

SECONDARY IMPACTS

The direct impacts associated with the on-airport tenant, Garden State Aviation, and general aviation visitors create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from the on-airport tenant and general aviation visitors at Camden County Airport was approximately $1.3 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 34 persons, with a total annual payroll (direct and secondary) of approximately $777,400 associated with these jobs.

Other Benefits

Data supplied by this study's survey efforts indicate businesses occasionally use the Camden County Airport. Information from the business, visitor, and aircraft owner surveys reveals that the professional and manufacturing industries are the top business users of the airport. Data from the visitor survey indicate that pilots base their aircraft at the Camden County Airport as an alternative to larger airports. Due to the size and nature of the airport, use by large corporations is minimal, although the airport is utilized by independent and small business such as Murite Entertainment. Individuals surveyed stated that the airport helps their business by affording them the ability to interact with more clients in less time.

Located one mile east of the Camden County Airport is the exclusive Pine Valley Golf Course which is a favorite among the many executives and their guests brought in by corporate aircraft. For other visitors traveling by light aircraft, Camden County Airport is in walking distance to the Berlin Farmers' Market and Clementon Lake and Park, and it is a short, ten-minute drive to the Garden State Race Track.

Airports in New Jersey mean more than just business, dollars, and jobs to the State. The Drug Enforcement Agency, Federal Bureau of Investigation, and the Winslow Police Department use the airport to help fight the war against drugs. The airport also supports organ transport and air ambulance flights. In addition, the Camden County Airport provides a home for 60 based aircraft and flight instruction to local pilots.

The Camden County Airport's potential for expansion is limited by surrounding residential areas and parks. However, the increase in local population and the airport's location (only 15 minutes from Philadelphia International Airport) should help bring additional air traffic to the airport. Camden County Airport encourages community involvement in planning for the future and in educating the public; the airport is an active community member of Berlin Township.

Summary

On an annual basis, Camden County Airport's tenants and visitors provide the following total benefits:

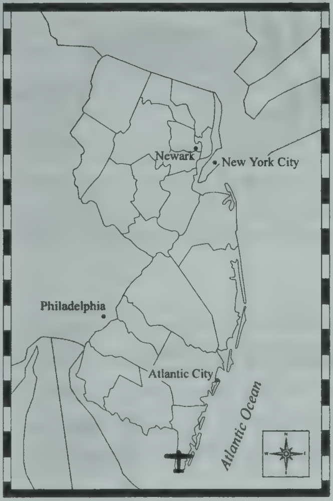
Jobs	Payroll	Output/Spending
34	$777,400	$1.3 million

Airport Location

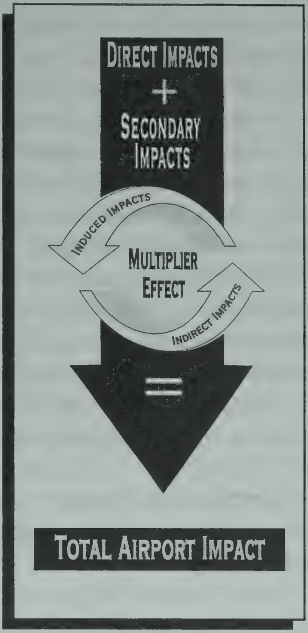
Cape May County Airport and Industrial Park are located on the most southern tip of the State of New Jersey near Cape May Point. The airport is in Lower Township in Cape May County. The airport is recognized as one of the State's largest general aviation facilities, covering 1,000 acres.

The airport is in proximity to an abundance of tourist attractions and activities such as the Atlantic Ocean beachfront and boardwalk, Wildwood and Cape May beaches, County Park and Zoo, historic Cold Spring Village, Leanings Run Botanical Gardens, victorian village of Cape May, and the Mid-Atlantic Center for the Arts. The airport's location makes it a valuable transportation asset for nearby businesses. The airport is situated two miles east of Exit 4 on the Garden State Parkway and 38 miles southwest from the Atlantic City Expressway. Philadelphia is an 80-minute drive from the airport, New York is two and a half hours north, and Atlantic City is situated 30 minutes north. The airport is home base to approximately 70 private and corporate aircraft and has approximately 60,000 annual operations.

Location Map



Identifying Economic Impacts



Cape May County Airport has three runways, all over 4,000 feet in length. Runway 1/19, with a length of 4,998 feet, is the primary runway and is outfitted with high intensity runway lighting (HIRL), precision approach path indicators (PAPI), and two nonprecision approaches (LOC RWY 19, RNAV RWY 19). Runway 10/28 is outfitted with medium intensity runway lighting (MIRL). The airport is owned and operated by Cape May County.

DIRECT IMPACTS

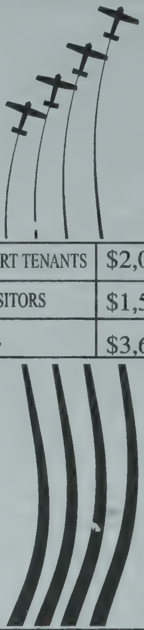
In 1994, there were five aviation-related tenants on the airport who supported over 76 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $5.8 million annually. The estimated direct annual payroll of these tenants is $2.1 million. Survey data indicated that approximately 13,500 visitors used the airport in 1994. Approximately 30 percent of these visitors used the airport for business travel, while 70 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $2.5 million. This visitor related output (spending) supported an additional 65 full-time jobs for employees earning $1.5 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	76.5	60.3	136.8
GA VISITORS	65.3	38.3	103.6
TOTAL	141.8	98.6	240.4



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$2,063,200	$1,461,300	$3,524,500
GA VISITORS	$1,547,600	$1,111,800	$2,659,400
TOTAL	$3,610,800	$2,573,100	$6,183,900

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$5,845,000	$4,117,000	$9,962,000
GA VISITORS	$2,450,300	$2,612,900	$5,063,200
TOTAL	$8,295,300	$6,729,900	$15,025,200

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Cape May County Airport was approximately $15.0 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 240 persons, with a total annual payroll (direct and secondary) of approximately $6.2 million associated with these jobs.

Other Benefits

Data supplied by this study's survey efforts indicate that although Cape May County Airport is primarily used by recreational flyers, it is occasionally used by businesses. Information from the business, visitor, and aircraft owner surveys reveals that professional, government, and financial are the typical industries that use the airport for business. The companies flying into the airport are most often located in Virginia or New York. Some of the more notable organizations using the airport for business include Zapata Protein, United States Coast Guard, and Oyster Creek Power Plant. Incoming businesses indicated that the airport is helpful to them because it allows them to visit areas not served by airlines and provides a more efficient means to service clients.

The airport's services include Part 135 air taxi operations, all forms of training, glider and soarer operations, aircraft restoration, and sightseeing tours. Cape May County Airport is also home to Pen Turbo Aviation, a dynamic company which is currently converting DHC-4 DeHaviland Caribou's into turboprop-powered aircraft. The Caribou has been used successfully to transport troops and heavy cargo into regions where most other fixed-wing aircraft cannot safely operate. NewCal Aviation is also on-site as one of the world's largest secondary market providers of aircraft for DeHaviland of Canada.

Cape May County Airport contributes in many ways to the overall quality of life in the Cape May County area. During the summer months, the airport acts as a gateway for out-of-state visitors coming to the area. Many of these individuals either own or rent homes, and due to the distance they have to travel, they would not be able to vacation on the Jersey Shore without the aid of aircraft. The based aircraft count goes from 70 during the winter months to an estimated 150 during the summer months. In addition, the airport offers flight instruction and sightseeing flights.

The airport is expected to grow; it is, however, encroached by the surrounding community and environmental constraints that may create difficulties for the future expansion of airside facilities. There is space available for the development of future landside facilities. The airport is an important part of the area's infrastructure to support its tourist-based economy.

In addition to the benefits noted below, the airport supports an additional 120 non-aviation jobs. Payroll associated with these jobs is $4.7 million. Annual output associated with the airport's non-aviation tenant is $8.5 million.

Summary

On an annual basis, Cape May County Airport's tenants and visitors provide the following total benefits:

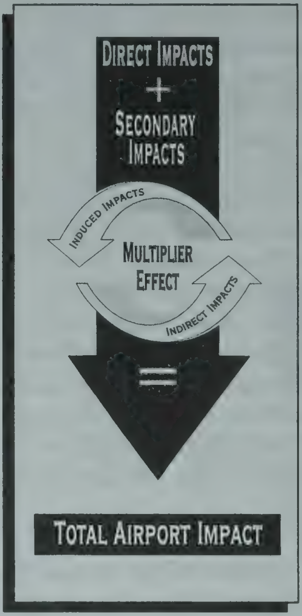
JOBS	PAYROLL	OUTPUT/SPENDING
240	$6.2 million	$15 million

AIRPORT LOCATION

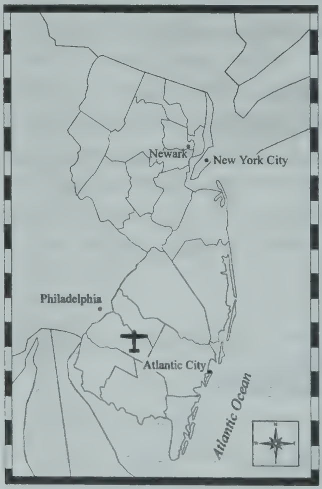
The Cross Keys Airport is situated on 260 acres in Monroe Township, in Gloucester County. The airport is operated by Cross Keys Airport Industries and is a designated reliever airport. Cross Keys Airport is located two miles from the Atlantic City Expressway and approximately 12 miles from the New Jersey Turnpike/Interstate Highway 295 corridor. Good highway access is available to the airport via U.S. 322. The Philadelphia Central Business District (CBD) is located 30 minutes east, New York City is two hours to the north, and Baltimore is located one and one-half hours to the south. The airport, with 95 based aircraft, logs over 66,500 annual operations.

Cross Keys Airport has a single runway (Runway 9/27) that measures 3,500 feet in length and is equipped with a nonprecision approach (VOR RWY 9). Navigational aids provided at the airport include low intensity runway lighting (LIRL) and runway end identifier lights (REILs) for Runway 9.

IDENTIFYING ECONOMIC IMPACTS



LOCATION MAP



DIRECT IMPACTS

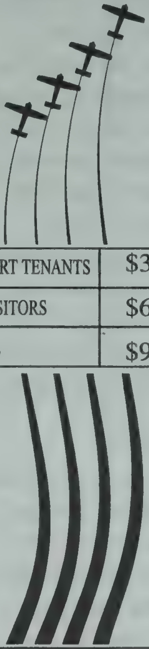
In 1994, there were eight aviation-related tenants on the airport who supported over 18 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $1.4 million annually. The estimated direct annual payroll of these tenants is $349,300. Survey data indicated that approximately 4,200 visitors used the airport in 1994. Approximately 50 percent of these visitors used the airport for business travel, while 50 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $964,500. This visitor related output (spending) supported an additional 26 full-time jobs for employees earning $609,100 annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	18.5	18.2	36.7
GA VISITORS	25.7	15.0	40.7
TOTAL	44.2	33.2	77.4



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$349,300	$240,300	$589,600
GA VISITORS	$609,100	$437,600	$1,046,700
TOTAL	$958,400	$677,900	$1,636,300

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$1,442,300	$1,026,900	$2,469,200
GA VISITORS	$964,500	$1,028,500	$1,993,000
TOTAL	$2,406,800	$2,055,400	$4,462,200

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Cross Keys Airport was approximately $4.5 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 77 persons, with a total annual payroll (direct and secondary) of approximately $1.6 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses occasionally use the Cross Keys Airport. Information from the business, visitor, and aircraft owner surveys reveals that retail and manufacturing industries are the top business users of the airport. Data from the visitor's survey indicate that pilots base their aircraft at the Cross Keys Airport as an alternative to larger airports. Due to the size and nature of the airport, use by large corporations is minimal. The airport is utilized by independent and small businesses. Individuals surveyed stated that the airport helps their business in variety of ways. The most noted of these ways include faster travel, less expensive travel than scheduled airline service, and the ability to interact with more clients in less time.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The Cross Keys Airport provides flight instruction, emergency medical patient transfers, and a venue for the recreational flyer to operate. In particular, the airport supports the recreational activities of parachutists.

Some of the beneficial activities at the airport include QEI, a business responsible for developing a localizer which is a navigational aid for airports. The airport is also home to the South Jersey Aero Club which has a large membership and makes extensive use of the airport for instruction and training.

In addition to its aviation-related tenant and visitor impacts, the airport also successfully supports one additional non-aviation tenant who has 19 employees. Average annual economic output related to this non-aviation tenant is $1.4 million.

Cross Keys Airport encourages community involvement and is active in the local community of Williamstown. The airport recognizes that today's airport must be a safe, multi-purpose facility that maintains community compatibility. The airport has published a noise abatement procedure to promote community compatibility. Cross Keys Airport plays a key role in the economic future of Gloucester County.

SUMMARY

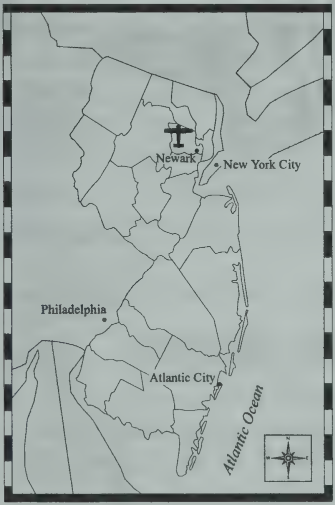
On an annual basis, Cross Keys Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
77	**$1.6 million**	**$4.5 million**

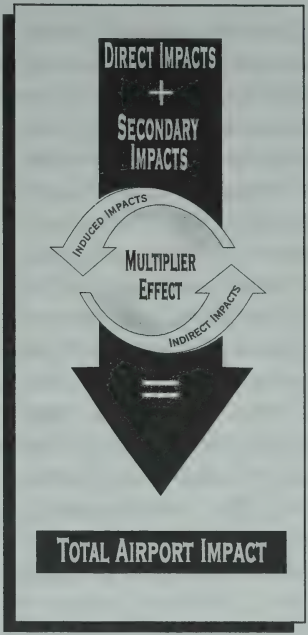
AIRPORT LOCATION

Essex County Airport is located 20 miles west of New York City; the airport is situated in Fairfield Township, New Jersey. The airport is operated by the Essex County Improvement Authority and is a publicly-owned, publicly-funded, public-use facility. Essex County's location gives the airport a distinct business advantage. The airport is located 20 miles west of New York City and 11 miles northwest of Newark. The airport is a designated reliever airport. The airport is located in what is called the "gateway" portion of New Jersey and is accessible by State Route 80 and State Route 46. The area is a gateway to the entire megalopolis, being linked to New York by bridges, tunnels, and ferry boats. Newark International Airport, located less than 15 miles away, is one of the country's largest and fastest growing commercial airports. Recognizing the airport's potential to attract industrial activities and provide access to the region's urban centers and suburban corporate complexes, the Essex County Improvement Authority developed an Airport Improvement Program to keep pace with planned growth.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Essex County Airport, with 378 based aircraft and the help of an FAA air traffic control tower, experiences over 217,000 annual operations on its two runways. Runway 4/22 is 4,553 feet in length, while Runway 9/27 is 3,721 feet in length. Runway 4/22 has two nonprecision approaches (NDB RWY 22, LOC RWY 22), while Runway 9/27 has a visual approach. Both runways are outfitted with medium intensity runway lighting (MIRL), and Runway 22 is equipped with a visual approach slope indicator (VASI).

DIRECT IMPACTS

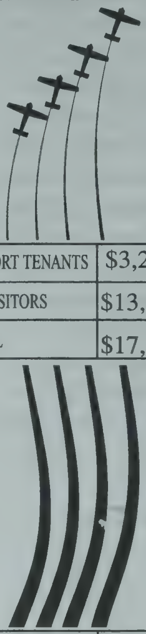
In 1994, there were nine aviation-related tenants on the airport who supported over 121 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $11.1 million annually. The estimated direct annual payroll of these tenants is $3.3 million. Survey data indicated that approximately 90,500 visitors used the airport in 1994. Approximately 70 percent of these visitors used the airport for business travel, while 30 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $21.9 million. This visitor related output (spending) supported an additional 584 full-time jobs for employees earning $13.8 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	121.5	110.3	231.8
GA VISITORS	583.7	341.8	925.5
TOTAL	705.2	452.1	1,157.3



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$3,280,900	$2,285,600	$5,566,500
GA VISITORS	$13,833,700	$9,938,200	$23,771,900
TOTAL	$17,114,600	$12,223,800	$29,338,400

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$11,084,600	$7,750,100	$18,834,700
GA VISITORS	$21,893,300	$23,345,700	$45,239,000
TOTAL	$32,977,900	$31,095,800	$64,073,700

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Essex County Airport was approximately $64.1 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 1,157 persons, with a total annual payroll (direct and secondary) of approximately $29.3 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use Essex County Airport as an alternate to the airports serving Teterboro and Newark. Information from the business, visitor, and aircraft owner surveys reveals that the top business users of the airport fall into the following categories: manufacturing, construction, and services. Companies visiting Essex County Airport are most often located in Pennsylvania and New York. Typical companies arriving at the Essex County Airport include Rectus Construction and CYRO Industries. Companies flying into the airport are conducting business with various companies in and around Essex County. Data from the business, visitor, and aircraft owner surveys indicate that Essex County Airport is important to businesses because it allows companies faster and more flexible travel, visitation of prospective development sites, and the ability to reach more customers in less time.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. Activities occurring at the Essex County Airport include recreational flying, flight instruction, and traffic and news reporting. In addition, the airport serves as a site for medivac operations and occasional human organ transportation. The airport is also used by the New Jersey Forest Fire Service.

Although the airport has just recently rebuilt the terminal and FBO areas, additional airport growth is constrained for various reasons. The land surrounding the airport is expensive, unavailable, or environmentally sensitive. In addition, the airport is not easily accessible from the interstate highway system.

The Essex County Improvement Authority recognizes that today's corporate airport must be a safe, multi-purpose facility that maintains community compatibility. The Essex County Airport master plan provides guidelines for future development which are geared to attract Forbes and Fortune 500 corporations. The airport plays a significant role in the economic well-being of Essex County.

SUMMARY

On an annual basis, Essex County Airport's tenants and visitors provide the following total benefits:

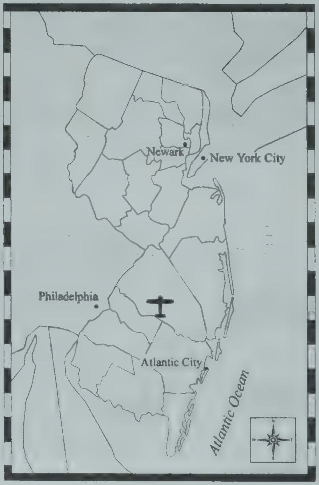
JOBS	PAYROLL	OUTPUT/SPENDING
1,157	$29.3 million	$64 million

AIRPORT LOCATION

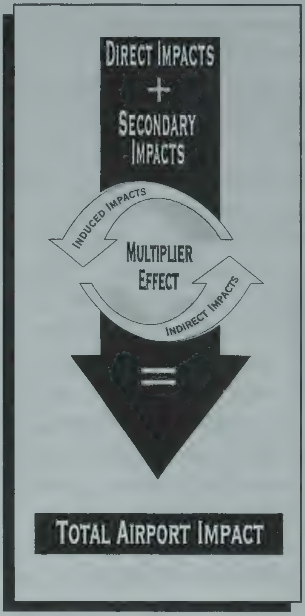
Flying W Airport is located in the greater Philadelphia metropolitan area. The airport is situated in Burlington County. Good highway access is available from all directions. The airport is located eight miles from the New Jersey Turnpike and 10 miles from Interstate Highway 295. The Philadelphia Central Business District (CBD) is a 35-minute drive, New York is located approximately one and one-half hours to the northeast, and Baltimore is situated approximately one and one-half hours south. The airport, with 105 based aircraft, experiences over 56,000 annual operations.

The airport is very well-maintained and is geared to community and family enjoyment. The family atmosphere is enhanced by a western ranch-style restaurant, cocktail lounge, and motel, complete with an airplane-shaped swimming pool, snack bar, and catering facilities. The airport's proximity to tourist attractions and activities such as the Philadelphia waterfront (Penn's Landing), Golden Pheasant Golf Course, and Great Adventure Amusement Park makes the airport a valuable transportation asset for nearby businesses.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



The airport's runway, Runway 1/19, is 3,496 feet in length, with a full-length parallel taxiway. The airport is equipped with high intensity runway lighting (HIRL) and a visual approach slope indicator (VASI) for Runway 1. Future plans for the airport include development of additional apron space, the installation of precision approach path indicators (PAPIs), and the addition of a nonprecision GPS approach. In addition, the airport's owners plan to construct T-hangars and conventional hangars in the near future.

DIRECT IMPACTS

In 1994, there were eight aviation-related tenants on the airport who supported over 34 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $1.9 million annually. The estimated direct annual payroll of these tenants is $741,900. Survey data indicated that approximately 13,100 visitors used the airport in 1994. Approximately 40 percent of these visitors used the airport for business travel, while 60 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $2.6 million. This visitor related output (spending) supported an additional 69 full-time jobs for employees earning $1.6 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	34.5	33.8	68.3
GA VISITORS	68.6	40.1	108.7
TOTAL	103.1	73.9	177.0

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$741,900	$510,200	$1,252,100
GA VISITORS	$1,625,800	$1,168,000	$2,793,800
TOTAL	$2,367,700	$1,678,200	$4,045,900

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$1,937,600	$1,379,500	$3,317,100
GA VISITORS	$2,574,800	$2,745,700	$5,320,500
TOTAL	$4,512,400	$4,125,200	$8,637,600

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Flying W Airport was approximately $8.6 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 177 persons, with a total annual payroll (direct and secondary) of approximately $4.0 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate that small businesses routinely use Flying W Airport as an alternative to South Jersey Regional Airport. Information from the business, visitor, and aircraft owner surveys reveals that the top business users of the airport fall into the following classifications: professional, financial, and construction. The majority of businesses that fly into the airport are usually based in Pennsylvania and New York. Companies flying into New Jersey via Flying W Airport include Allstate Insurance, Keating Fiber, K. Hovnanian Inc., and W.R. Carnes and Associates. Local businesses indicated that the airport provides them the ability to deliver supplies to job sites, to experience less travel time, and to have better contact with clients.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The Flying W Airport offers a home base for recreational pilots, flight instruction, and a place for both pilots and the community to dine out and swim at the airport's motel and restaurant. The airport serves as a location for FAA safety seminars and a location for on-site pilot-related medical examinations.

The airport is especially interested in exposing local children to the world of aviation. Numerous children from local schools, Cub Scout packs, and Boy Scout troops have toured the airport. American Airlines is working in conjunction with the Flying W Airport to expose children from economically challenged families to possible careers in aviation. Altogether, the airport has had over 1,000 children come through its doors.

Flying W Airport will continue to grow because the owners are dedicated to the long-term development of the facility. In addition, the operator wants to continue to keep the airfield as a center for flight instruction. In order for the airport to continue to adequately serve the needs of its users, it will need to add space for the storage of additional aircraft. Flying W Airport encourages community involvement and is active in the local communities of Lumberton and Medford. The Flying W Airport is strategically located near a fast growing township in Burlington County. Local business growth will initiate further usage and development of the airport and allow it to play a key role in the economic future of Burlington County.

SUMMARY

On an annual basis, Flying W Airport's tenants and visitors provide the following total benefits:

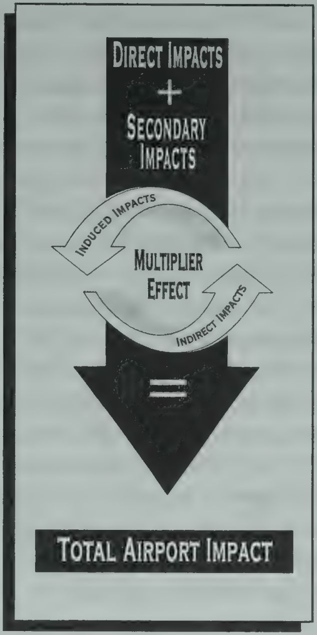
JOBS	PAYROLL	OUTPUT/SPENDING
177	**$4.0 million**	**$8.6 million**

AIRPORT LOCATION

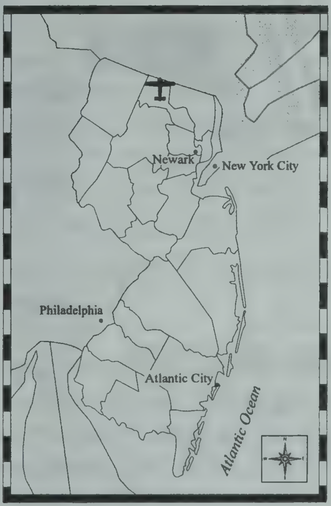
Greenwood Lake Airport is located in Passaic County, 38 miles west of New York City and five miles south of New York State. The airport is located in West Milford, New Jersey and is well-maintained and surrounded by rural and agricultural land. This setting, together with the airport's low traffic volumes, makes the airport an ideal training site for novice pilots and the weekend flyer. The airport's proximity to tourist attractions and activities such as Greenwood Lake, makes it a valuable transportation asset.

Greenwood Lake Airport, with 52 based aircraft, experiences approximately 30,000 annual operations. Greenwood Lake Airport, accessible by State Route 693 and State Route 613, is privately-owned and is situated on 115 acres of land. The airport has an active runway with a length of 4,000 feet and a width of 60 feet. A partial length taxiway serves the runway. The airport's single runway, Runway 6/24, is outfitted with low intensity runway lighting (LIRL). The airport is served by a nonprecision approach (VOR A).

IDENTIFYING ECONOMIC IMPACTS



LOCATION MAP



DIRECT IMPACTS

In 1994, there were three aviation-related tenants on the airport who supported nine employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $850,300 annually. The estimated direct annual payroll of these tenants is $106,400. Survey data indicated that approximately 5,600 visitors used the airport in 1994. Approximately 40 percent of these visitors used the airport for business travel, while 60 percent used the airport for personal-use. Direct output from general aviation visitors is estimated at an annual $1.3 million. This visitor related output (spending) supported an additional 34 full-time jobs for employees earning $805,800 annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	9.0	8.8	17.8
GA VISITORS	34.0	19.9	53.9
TOTAL	43.0	28.7	71.7

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$106,400	$73,200	$179,600
GA VISITORS	$805,800	$578,900	$1,384,700
TOTAL	$912,200	$652,100	$1,564,300

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$850,300	$605,400	$1,455,700
GA VISITORS	$1,274,300	$1,358,800	$2,633,100
TOTAL	$2,124,600	$1,964,200	$4,088,800

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Greenwood Lake Airport was approximately $4.1 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 72 persons, with a total annual payroll (direct and secondary) of approximately $1.6 million associated with these jobs.

Other Benefits

Information from the business, visitor, and aircraft owner surveys indicate that although the Greenwood Lake Airport is mainly used by the recreational aviator, it is also occasionally used by business aircraft. Data supplied by this study's efforts indicate that typical industries that use the airport are in the agricultural and service categories. Companies flying into the airport are located mainly in the northeastern United States. Usually, aircraft entering and departing the area are being utilized by smaller, independent businesses. These businesses indicate that the airport is helpful to them because it is less expensive and provides a more flexible alternative to scheduled commercial airline service.

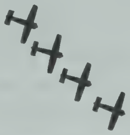
Airports in New Jersey mean more than just business dollars and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The types of activities that occur at Greenwood Lake Airport on a regular basis include recreational flying, flight instruction, and pipeline patrol. Another beneficial use of the airport includes the storage of antique/classic aircraft; this contributes to the preservation of our nation's aviation history. Crop dusters, who use their general aviation aircraft to preserve the region's agricultural industry, are also based at the airport.

Greenwood Lake Airport's potential for growth is strong. The airport is located just west of the airspace surrounding New York City. As other reliever airports reach capacity, Greenwood Lake Airport should be in a good position to accept the overflow aircraft. In addition, over 700 acres of developable land are available immediately adjacent to the airport.

Summary

On an annual basis, Greenwood Lake Airport's tenants and visitors provide the following total benefits:

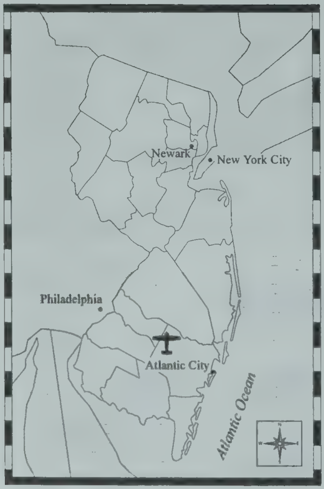
Jobs	Payroll	Output/Spending
72	$1.6 million	$4.1 million



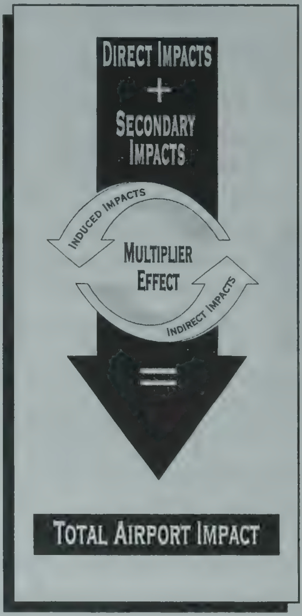
AIRPORT LOCATION

Hammonton Municipal Airport is located in the south central part of New Jersey, halfway between Atlantic City and Philadelphia. The airport is in Atlantic County in Hammonton. The airport is situated four miles north of the Atlantic City Expressway and 20 miles west from the Garden State Parkway. Both Atlantic City and Philadelphia are a 30-minute drive, and New York City is situated two hours to the north. Hammonton Municipal Airport is a publicly-owned, public-use general aviation airport. The 107-acre airport is well-maintained in a rural setting. This setting, together with the airport's low traffic volumes, makes the airport an ideal training site for novice pilots, the weekend flyer, glider pilots, and parachutists.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Hammonton Municipal Airport is owned by the City of Hammonton. With 55 based aircraft, the airfield experiences 49,500 total annual operations. The airport's single runway, Runway 3/21, is outfitted with two nonprecision approaches (VOR A, VOR B), low intensity runway lighting (LIRL), precision approach path indicators (PAPIs), and runway end identifier lights (REILs). The runway measures 3,004 feet in length.

DIRECT IMPACTS

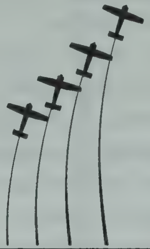
In 1994, there were two aviation-related tenants on the airport who supported over 11 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $6.2 million annually. The estimated direct annual payroll of these tenants is $531,900. Survey data indicated that approximately 5,300 visitors used the airport in 1994. Approximately 30 percent of these visitors used the airport for business travel, while 70 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $959,300. This visitor related output (spending) supported an additional 26 full-time jobs for employees earning $606,700 annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	11.5	11.3	22.8
GA VISITORS	25.6	15.0	40.6
TOTAL	37.1	26.3	63.4



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$531,900	$365,800	$897,700
GA VISITORS	$606,700	$435,800	$1,042,500
TOTAL	$1,138,600	$801,600	$1,940,200

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$6,186,100	$4,404,200	$10,590,300
GA VISITORS	$959,300	$1,022,900	$1,982,200
TOTAL	$7,145,400	$5,427,100	$12,572,500

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Hammonton Municipal Airport was approximately $12.6 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 63 persons, with a total annual payroll (direct and secondary) of approximately $1.9 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate that although the Hammonton Municipal Airport is used mainly by the recreational flyer, it is occasionally used by businesses. Information from the business, visitor, and aircraft owner surveys indicates that manufacturing, financial, and service industries are the most common users of the airport. Companies flying into the airport are located mainly in the northeastern United States. Some of the more notable companies using the airport for business include Carter Aviation, Eastern Aero Supply, and other small and independent businesses. Local businesses indicate that the airport is helpful because it allows them to attend meetings at the spur of the moment, and it is a more efficient way of visiting clients during an emergency situation.

Airports such as Hammonton should not be valued only by the number of business dollars they bring into the area. The airport also contributes to the community by providing recreational pilots a place to base and operate their aircraft and by giving the Forest Service a location to refuel when fighting forest fires. The airport offers training, provides a compatible environment for glider operations, and serves as a base for aerial advertising and banner towing. The airport also accommodates a number of antique/classic aircraft.

Hammonton Township is projecting steady growth over the next 20 years, and the Hammonton Municipal Airport should enjoy the benefits of a growing population. However, the airport's growth may be limited. Although the airport has land to construct additional buildings, the possibility of a runway extension is limited by preservation and agricultural areas that surround the airport.

SUMMARY

On an annual basis, Hammonton Municipal Airport's tenants and visitors provide the following total benefits:

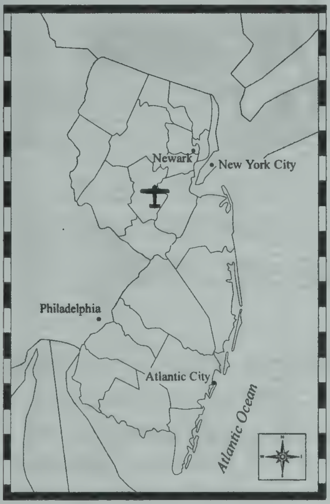
JOBS	PAYROLL	OUTPUT/SPENDING
63	**$1.9 million**	**$12.6 million**

AIRPORT LOCATION

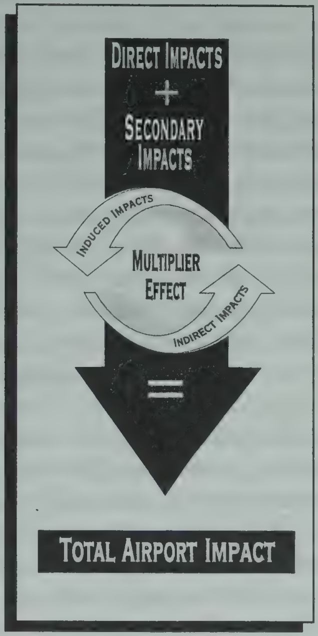
Kupper Airport is located in central New Jersey in Hillsborough Township. Kupper Airport is a public-use general aviation airport owned and operated by Tri-State Airways of Manville, New Jersey. The airport is situated in Somerset County and is 34 miles southwest of New York City. Good highway access to the airport is available from all directions. Kupper Airport is located less than five miles from State Route 202, State Route 206, State Route 22, and Interstate Highway 287. Both the Newark and Philadelphia central business districts are located less than one hour away, and New York City is less than one and one-half hours away by car.

Kupper Airport is home to almost 130 single and multi-engine aircraft; the airport logs approximately 41,700 operations a year. The airport is a designated reliever. The airport is privately-owned and is situated on 119 acres of land. The single runway, Runway 7/25, is 3,450 feet in length; the airport has a circling nonprecision instrument approach (VOR A) and medium intensity runway lighting (MIRL).

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



DIRECT IMPACTS

In 1994, there were three aviation-related tenants on the airport who supported over 30 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $2.1 million annually. The estimated direct annual payroll of these tenants is $483,600. Survey data indicated that approximately 10,700 visitors used the airport in 1994. Approximately 50 percent of these visitors used the airport for business travel, while 50 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $2.2 million. This visitor related output (spending) supported an additional 60 full-time jobs for employees earning $1.4 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	30.5	29.9	60.4
GA VISITORS	59.8	35.0	94.8
TOTAL	90.3	64.9	155.2

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$483,600	$332,600	$816,200
GA VISITORS	$1,417,300	$1,018,200	$2,435,500
TOTAL	$1,900,900	$1,350,800	$3,251,700

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$2,142,600	$1,525,400	$3,668,000
GA VISITORS	$2,241,800	$2,390,500	$4,632,300
TOTAL	$4,384,400	$3,915,900	$8,300,300

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Kupper Airport was approximately $8.3 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at over 155 persons, with a total annual payroll (direct and secondary) of approximately $3.3 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses use Kupper Airport as an alternative to Philadelphia International Airport. Information from the business, visitor, and aircraft owner surveys reveals that the business users of the airport are in professional services and government categories. Pennsylvania and Virginia are the two most popular states of origin for business traffic entering New Jersey via Kupper Airport. Companies flying into New Jersey via Kupper Airport to conduct business include IMI and Specialty Electronic Systems. Local companies, such as Prudential, benefit from utilizing Kupper Airport. In addition, local businesses indicate that the airport has reduced travel time for employees, increased their client base, increased the speed in which clients can be serviced, and shortened their down-time by having essential parts transported in by air.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The Kupper Airport provides flight instruction, a training area for the Civil Air Patrol, and a venue for the recreational flyer. Kupper Airport encourages community involvement in planning. The airport is an active member of the local communities in Manville and Hillsborough townships. The airport has been a catalyst and has opened its doors for events and community activities that benefit all the citizens of Somerset County. The airport hosts tours for local elementary school children, Boy Scout Days, and a Horizons Program for junior high school students.

The Township of Hillsborough is currently investigating the economic feasibility of acquiring Kupper Airport. If the township does acquire the airport, the potential for future growth will be greatly enhanced. The airport is situated in a good location with adequate road access. In addition, developable land is located next to the airport if future expansion is required. The Kupper Airport master plan includes guidelines for future development which are geared toward attracting corporations. The airport is expected to play a key role in the economic future of Somerset County.

SUMMARY

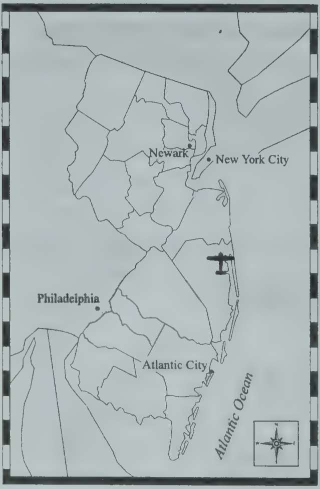
On an annual basis, Kupper Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
155	$3.3 million	$8.3 million

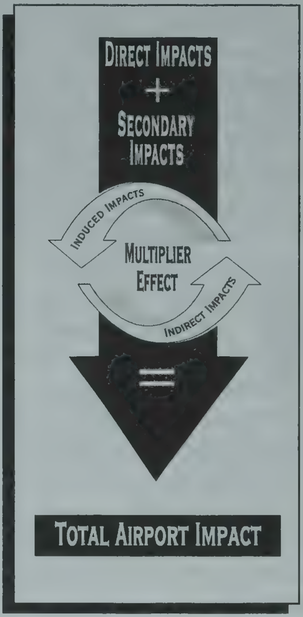
AIRPORT LOCATION

Lakewood Airport is located in historic Lakewood Township, New Jersey. The airport is situated in northern Ocean County, in the center of the northeastern metropolitan area. Ocean County is the second largest county in New Jersey. The 222-acre airport site is in proximity to an abundance of tourist attractions and activities such as the Atlantic Ocean beachfront and boardwalks, the Atlantic City casinos, Island Beach State Park, and Barnegat Lighthouse. The airport is a valuable transportation asset for visitors and nearby businesses. The airport lies 58 miles south of New York City, 51 miles north of Philadelphia, and 52 miles north of Atlantic City. Access to the airport is convenient; the Garden State Parkway is located two miles east of the facility and Interstate Highway 195 is 14 miles to the north.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Lakewood Airport is open to the public. The airport, with 80 based aircraft, experiences approximately 34,000 annual operations. Runway 6/24 is 3,457 in length and is equipped with a nonprecision (VOR RWY 6). Navigational aids include low intensity runway lighting (LIRL) and a rotating beacon.

DIRECT IMPACTS

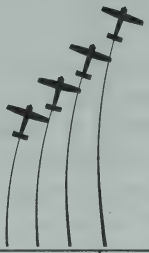
In 1994, there was one aviation-related tenant located on the airport. In order to preserve tenant confidentiality, total tenant and visitor impacts have been combined. This tenant's direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total combined direct output stemming from all on-airport tenants and general aviation visitors at Lakewood Airport is approximately $2.7 million. Total direct full-time employment, related to airport tenants and general aviation visitors, is estimated at 59 persons, with a total direct annual payroll of approximately $1.3 million. Survey data indicated that approximately 9,300 visitors used the airport in 1994. Approximately 50 percent of these visitors used the airport for business travel, while 50 percent used the airport for personal use.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	7.0	6.9	13.9
GA VISITORS	52.1	30.5	82.6
TOTAL	59.1	37.4	96.5



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$1,346,800	$964,100	$2,310,900

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$2,655,300	$2,583,400	$5,238,700

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Lakewood Airport was approximately $5.2 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 97 persons, with a total annual payroll (direct and secondary) of approximately $2.3 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use Lakewood Airport as an alternate to Allaire Airport. Information from the business, visitor, and aircraft owner surveys reveals that the retail, service, and construction industries are the top business users of the airport. Businesses that fly into Lakewood Airport are most often located in the eastern section of the United States. Companies using the Lakewood Airport to conduct business include small and independent businesses, such as Donnely Real Estate. Businesses indicate that the airport allows them to significantly reduce travel time and to access a greater range of clients.

The Lakewood Airport contributes in many ways to the community where it is located. The Lakewood Airport offers flight instruction, aerial tours, and storage for 80 aircraft. Some of the beneficial activities at the airport include the Pineland Composite Squadron and the New Jersey Wing of the Civil Air Patrol which is based at Lakewood Airport. The Civil Air Patrol (CAP) is an aeronautical cadet program for young adults ages 13-21, and an official auxiliary of the U.S. Air Force. The cadets participate in search and rescue efforts, communications, damage assessment, dike construction, and disaster relief missions for other agencies such as FEMA and the Red Cross. The cadet program's goal is to provide an environment to motivate American youth to develop leadership qualities and to become responsible citizens through aviation-centered activities. The CAP Wing based at the airport has received three consecutive outstanding ratings by the U.S. Air Force.

Immediately adjacent to the airport lies the Lakewood Industrial Park. As the industrial park grows, the local population will increase. Local population increases will benefit the airport by providing more pilots and potential students. With the addition of more businesses, there will be an increased need for business travel and for the services the airport provides.

SUMMARY

On an annual basis, Lakewood Airport's tenants and visitors provide the following total benefits:

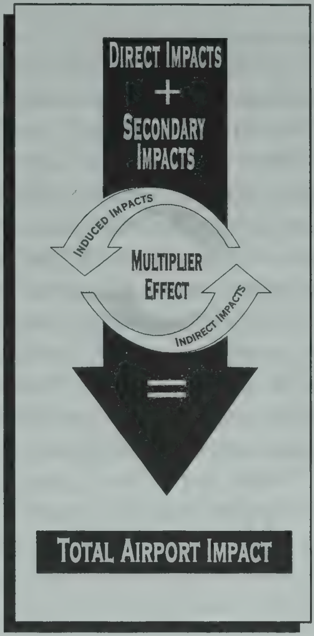
JOBS	PAYROLL	OUTPUT/SPENDING
97	$2.3 million	$5.2 million

AIRPORT LOCATION

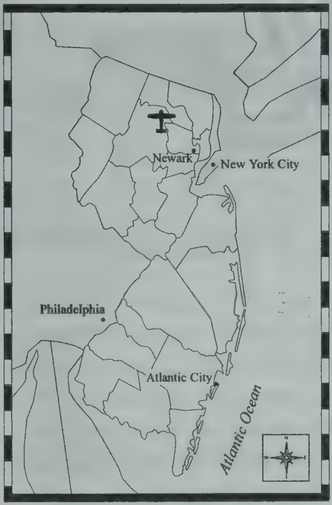
Lincoln Park Airport is located in northern New Jersey. Lincoln Park Airport is a privately-owned, public-use general aviation airport located two miles north of Route 22 on the border of the Borough of Lincoln Park and the Township of Pequannock. The airport is situated in Morris County and lies 20 miles west of New York City. Highway access is available from all directions. Lincoln Park Airport is located less than five miles from Interstate Highway 287, Interstate Highway 80, and State Route 23. Both the Newark and the New York City central business districts are situated less than one hour away, and Philadelphia's central business district is less than two hours away.

Lincoln Park Airport serves primarily small single-engine and light twin-engine aircraft. The airport has an estimated 180 based aircraft and approximately 80,500 annual operations. Lincoln Park has been designated as a reliever airport, as noted in the National Plan of Integrated Airport Systems (NPIAS). This airport serves the vital interests of the New York/New Jersey metropolitan area. The airport has a single runway, Runway 1/19, with a nonprecision approach (NDB RWY 1). The runway is 2,942 feet in length and is outfitted with medium intensity runway lighting (MIRL).

IDENTIFYING ECONOMIC IMPACTS



LOCATION MAP



Direct Impacts

In 1994, there were six aviation-related tenants on the airport who supported over 27 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct annual output from all on-airport aviation-related tenants is estimated at $2.9 million annually. The estimated direct annual payroll of these tenants is $710,500. Survey data indicated that approximately 5,800 visitors used the airport in 1994. Approximately 20 percent of these visitors used the airport for business travel, while 80 percent used the airport for personal-use. Direct output from general aviation visitors is estimated at an annual $955,500. This visitor-related output (spending) supported an additional 26 full-time jobs for employees earning $604,400 annually.

Secondary Impacts

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	27.5	27	54.5
GA VISITORS	25.5	14.9	40.4
TOTAL	53.0	41.9	94.9

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$710,500	$488,600	$1,199,100
GA VISITORS	$604,400	$434,200	$1,038,600
TOTAL	$1,314,900	$922,800	$2,237,700

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$2,929,900	$2,085,900	$5,015,800
GA VISITORS	$955,500	$1,018,800	$1,974,300
TOTAL	$3,885,400	$3,104,700	$6,990,100

Total Impacts

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Lincoln Park Airport was approximately $7.0 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 95 persons, with a total annual payroll (direct and secondary) of approximately $2.2 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate smaller business aircraft routinely use Lincoln Park Airport as an alternate to the airports serving Morristown and Teterboro. Information from the business, visitor, and aircraft owner surveys reveals that service and agricultural industries are the top business users of the airport. Data from these surveys also indicate that Lincoln Park Airport is important to the respondents' ability to conduct business in New Jersey as exemplified by encountering less travel time than by car and by providing on-demand transportation.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The Lincoln Park Airport provides flight instruction and tie-down facilities for over 180 based aircraft.

The Lincoln Park Airport will continue to grow due to good access to major highways, affluent communities surrounding the airport, and its proximity to New York City. For the airport to continue to adequately serve the needs of its market area, however, consideration should be given to promoting long-term compatibility with the residential areas around the airport.

SUMMARY

On an annual basis, Lincoln Park Airport's tenants and visitors provide the following total benefits:

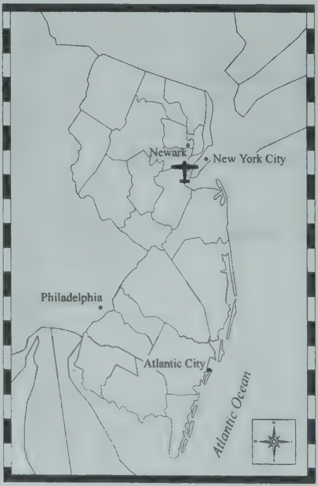
JOBS	PAYROLL	OUTPUT/SPENDING
95	$2.2 million	$7.0 million

AIRPORT LOCATION

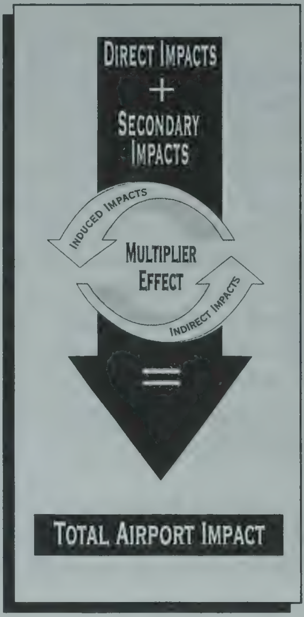
Linden Airport is located in northern New Jersey. The airport is situated in Union County and lies three miles south of Newark International Airport. The airport is located only 15 miles from New York City and 70 miles from Philadelphia. Linden Airport is a publicly-owned, public-use facility owned by the City of Linden. Linden Airport serves two major market centers, suburban Manhattan-New England and the Boston-Washington corridor. The airport's Foreign Trade Zone enhances the area's economic development opportunities for attracting new companies to Union County.

Linden Airport is owned by the City of Linden and is operated by Linden Air Services Corporation. The airfield is easily accessible from the New Jersey Turnpike, the Garden State Parkway, and State Route 1/9. The airport has over 75,000 operations per year and provides a vital transportation link in the Union County infrastructure. The airport is a designated reliever airport for Newark International Airport. The airport is home to approximately 128 based aircraft and hosts the helicopter fleet for the President of the United States when he visits the New York/New Jersey area. Linden Airport encompasses approximately 188 acres of land and has two main runways. Runway 9/27 is 4,137 feet long and 100 feet wide, while Runway 14/32 is 2,494 feet long and 75 feet wide. Both runways are outfitted with medium intensity runway lighting (MIRL). The airport is served by two nonprecision approaches (VOR C, VOR/DME D). The airport has preliminary plans to shut down Runway 14/32 to support non-aviation related development.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



DIRECT IMPACTS

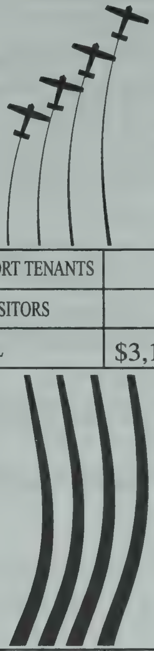
In 1994, there was one aviation-related tenant located on the airport. In order to preserve this tenant's confidentiality, total tenant and visitor impacts have been combined. This tenants' direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total combined direct output stemming from all on-airport tenants and general aviation visitors at Linden Airport was approximately $5.3 million. Total direct full-time employment related to airport tenants and general aviation visitors, is estimated at over 136 persons, with a total direct annual payroll of approximately $3.1 million. Survey data indicated that approximately 20,100 visitors used the airport in 1994. Approximately 70 percent of these visitors used the airport for business travel, while 30 percent used the airport for personal use.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	11.0	10.8	21.8
GA VISITORS	125.2	73.3	198.5
TOTAL	136.2	84.1	220.3



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$3,118,200	$2,235,500	$5,353,700

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$5,305,800	$5,441,600	$10,747,400

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Linden Airport was approximately $10.7 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 220 persons, with a total annual payroll (direct and secondary) of approximately $5.4million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate that Linden Airport is used primarily by businesses as a reliever for Newark International Airport. Information from the business, visitor, and aircraft owner surveys reveals that employers in the manufacturing, transportation, and professional services categories are the top users of the airport. Businesses that fly into Linden Airport are most often located in Pennsylvania, Ohio, and Maine. Companies flying into New Jersey via Linden Airport include Enger Aviation; Heritage Equipment; and Physician Support Systems, Inc. Typical local companies that benefit from the airport are Exxon, Dupont, General Dynamics, Metropolitan Life Insurance, and General Motors. Businesses surveyed indicte that the airport is important because it allows them access, by way of non-scheduled jet service, to meetings, job sites, and branch facilities.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. At Linden Airport, the types of activities that occur at the airport on a regular basis include flight training and recreational flying. "Gateway" use by VIP's, such as President Bill Clinton and Governor Christine Todd-Whittman, also occurs at the airport.

The Linden Airport serves as a site for significant aviation-related support facilities and services such as support to Marine One; Federal Aviation Regulation Part 135 air taxi and commuter operations; New Jersey State and Linden Police Departments; emergency staging and medical evacuation; just-in-time delivery to the local General Motors plant; search and rescue; aerial advertising/banner towing; beginning and advanced flight instruction; New Jersey Department of Environmental Protection; and the Federal Bureau of Investigation.

The airport has opened its doors for community events such as Boy Scouts of America; Aviation Explorer Post #224; training for police, police canine units, and firefighters; fund-raising events; PBA car shows; Garden State Aviation Expo; and Save Our Aviation Resources (SOAR).

The City of Linden recognizes that today's corporate airport must maintain community compatibility, and it has published Noise Abatement Procedures. The Linden Airport master plan provides guidelines for future development which are geared toward serving Forbes and Fortune 500 corporations conducting business in the region. The airport is a key player in the continued economic success of New Jersey.

Linden Airport is located only a few miles south of the Teterboro and Newark airports, and less than 30 minutes by car from New York City. In addition, the airport is located one mile from the New Jersey Transit train station that provides access to midtown Manhattan (Penn Station) in under 25 minutes. The airport's fixed-base operator plans to relocate its operation to new terminal and hangar facilities on the opposite side of the airport. Underveloped airport property is periodically used to store shipments of new GM trucks. With the airport's new facilities and excellent location, the outlook for growth is good.

SUMMARY

On an annual basis, Linden Airport's tenants and visitors provide the following total benefits:

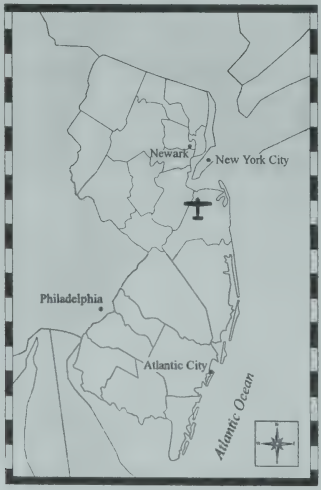
JOBS	PAYROLL	OUTPUT/SPENDING
220	**$5.4 million**	**$10.7 million**

AIRPORT LOCATION

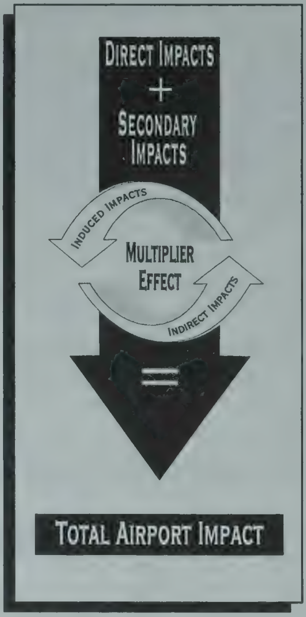
Marlboro Airport is located in Monmouth County, approximately seven miles south of the Garden State Parkway and less than 15 miles from the New Jersey Shore. The airport is situated south of Matawan. Monmouth County is situated approximately 40 miles south of New York and an estimated 50 miles northeast of Philadelphia. The county is bisected by Interstate Highway 195 and the Garden State Parkway, allowing easy access to both Newark International Airport and Philadelphia International Airport. An intricate road structure has given Monmouth County a high degree of accessibility to the East Coast megalopolis.

Marlboro Airport is a privately-owned, public-use airport. With 87 based aircraft, the airport has over 39,000 operations a year.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Marlboro Airport has one runway, Runway 9/27, that is 2,156 feet in length and 50 feet wide. The airport has low intensity runway lighting (LIRL), runway end identifier lights (REILs), a visual approach slope indicator (VASI) for Runway 9, and a precision approach path indicator (PAPI) for Runway 27. Marlboro Airport is equipped with a circling approach (VOR A). The airport offers fuel, aircraft storage, flight instruction, and maintenance.

DIRECT IMPACTS

In 1994, there was one aviation-related tenant located on the airport. In order to preserve tenant confidentiality, total tenant and visitor impacts have been combined. This tenants' direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total combined direct output stemming from all on-airport tenants and general aviation visitors at Marlboro Airport was approximately $948,300. Total direct full-time employment related to airport tenants and general aviation visitors, is estimated at 22 persons, with a total direct payroll of approximately $522,800 annually. Survey data indicated that approximately 4,900 visitors used the airport in 1994. Approximately 10 percent of these visitors used the airport for business travel, while 90 percent used the airport for personal use.

SECONDARY IMPACTS

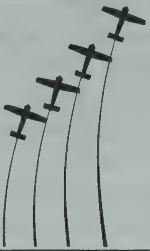
The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Marlboro Airport was approximately $1.9 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 35 persons, with a total payroll (direct and secondary) of approximately $896,300, annually, associated with these jobs.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	2.5	2.5	5.0
GA VISITORS	19.2	11.2	30.4
TOTAL	21.7	13.7	35.4



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$522,800	$373,500	$896,300

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$948,300	$930,100	$1,878,400

Other Benefits

Information gathered from discussions with the airport owner, local pilots, and on-site airport visits indicates that, although the Marlboro Airport is primarily used by recreational pilots, businesses do operate on occasion at the airport. The intrinsic recreational benefits provided by the airport are supported by the fact that the airport's low density development helps preserve green space and open areas in Monmouth County. Pilots that typically use the Marlboro Airport fly in whether they are on business or pleasure, instead of using other airports in the area. Marlboro Airport's main contribution is to the recreational pilot. Many beginning pilots and weekend flyers prefer the uncongested operating environment afforded by the Marlboro Airport. The airport provides a home to 87 privately-owned aircraft, flight instruction, and a location for fish spotters to base their operations.

The airport is anticipated to benefit from the population surge emanating from New York City. As local population increases, the aviation population should also increase proportionately.

Summary

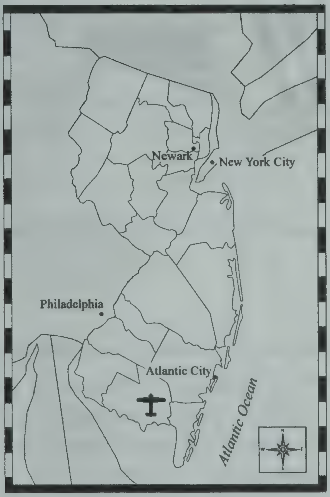
On an annual basis, Marlboro Airport's tenants and visitors provide the following total benefits:

Jobs	Payroll	Output/Spending
35	$896,300	$1.8 million

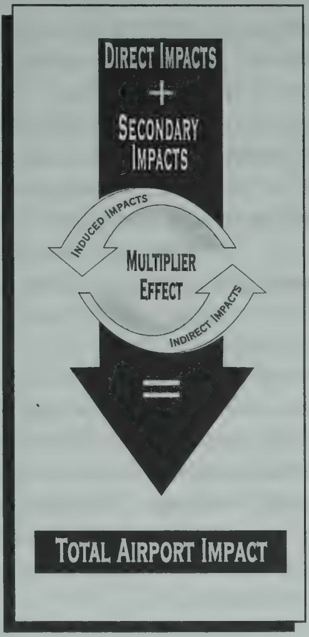
AIRPORT LOCATION

Millville Municipal Airport is located three miles southwest of the center of Millville in Cumberland County. Millville Municipal Airport is a premiere publicly-owned, public-use facility operated by the City of Millville. The airport serves major markets in the south central region of New Jersey. Millville Township has established a Foreign Trade Zone and an Urban Enterprise Zone which enhance economic development opportunities in Cumberland County. Philadelphia is located 36 miles northwest and New York City is located 120 miles north of the airport. Atlantic City lies 32 miles to the southeast of the airport. The airport is easily accessible from State Routes 49, 55, and 47. The Garden State Parkway is located 24 miles east, while the New Jersey Turnpike is located 32 miles west of the airport.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Millville Municipal Airport has the only FAA Flight Service Station (FSS) in the State; this FSS is the seventh busiest in the U.S. The airport, with almost 110 based aircraft, experiences an estimated 70,000 annual operations. Runway 10/28, the primary runway, is 6,001 feet in length and is equipped with a precision approach (ILS RWY 10). The runway is outfitted with high intensity runway lighting (HIRL), visual approach slope indicators (VASIs), and an approach lighting system (MALSR). Runway 14/32 is 5,057 feet long and is outfitted with two nonprecision approaches (NDB RWY 14, VOR/DME RNAV RWY 32). Runway lighting on Runway 14/32 includes MIRL, precision approach path indicators (PAPIs), and VASIs. Future facility improvements planned for the airport include the possible extension of Runway 10/28 to an ultimate length of 7,500 feet.

DIRECT IMPACTS

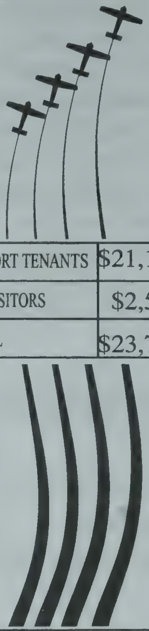
In 1994, there were 15 aviation-related tenants on the airport who supported over 671 employees. Airwork, Inc. employs over 500 workers at the airport. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $103.4 million annually. The estimated direct annual payroll of these tenants is $21.1 million. Survey data indicated that approximately 18,000 visitors used the airport in 1994. Approximately 65 percent of these visitors used the airport for business travel, while 35 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $4.1 million. This visitor related output (spending) supported an additional 109 full-time jobs for employees earning $2.6 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT+	SECONDARY =	TOTAL
AIRPORT TENANTS	671.5	631.2	1,302.7
GA VISITORS	109.4	64.1	173.5
TOTAL	780.9	695.3	1,476.2



PAYROLL

	DIRECT+	SECONDARY =	TOTAL
AIRPORT TENANTS	$21,134,900	$14,647,000	$35,781,900
GA VISITORS	$2,592,800	$1,862,700	$4,445,500
TOTAL	$23,727,700	$16,509,700	$40,237,400

OUTPUT

	DIRECT+	SECONDARY =	TOTAL
AIRPORT TENANTS	$103,433,700	$73,612,900	$177,046,600
GA VISITORS	$4,104,000	$4,376,300	$8,480,300
TOTAL	$107,537,700	$77,989,200	$185,526,900

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Millville Municipal Airport is approximately $185.5 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 1,476 persons, with a total annual payroll (direct and secondary) of approximately $40.2 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use the Millville Municipal Airport. Information from the business, visitor, and aircraft owners surveys shows that businesses from the manufacturing, service, and wholesale industries are the top users of the airport. Businesses that fly into Millville Municipal Airport are most often based in the northeastern United States. Companies that use the airport on a regular basis include Cherokee Rubber, Structural Foam, and UNC Airwork Corporation. Companies responding to surveys indicate that Millville Municipal Airport provides local businesses opportunities to better serve their clients and to create a larger sales radius.

Millville Municipal Airport means more than just business and dollars; the airport contributes unique and educational benefits to the surrounding community. The airport is home to the Army Airfield Museum, and over 100 aircraft are based on the field. The airport's FSS conducts tours for local children and provides weather forecasts for the area.

The Millville Municipal Airport serves as a site for significant aviation-related support services such as:

- UNC Airwork Corporation
- Federal Aviation Regulation Part 135 operations
- New Jersey State Police
- US Air Force and Air Guard operations
- Emergency medical services
- Beginning and advanced flight instruction
- International flights

The airport has opened its doors to Cumberland County events such as the Cumberland County Vocational Technical School Aircraft Maintenance Technician Program and the Cumberland County Easter Seal Program.

The airport is in the process of conducting an extensive air cargo study. The study is addressing the possibility of locating an air freight depot to ship glass products; New Jersey produce; and Delaware Bay clams, oysters, crabs, flounder, and other fish products. If the study is successful and plans are implemented, the airport and its tenants should greatly benefit. The City of Millville is dedicated to the long-term success of the airport. The city continually seeks to improve the facility and has received over $13 million in Federal grant money during the past 20 years.

In addition to the previously-noted benefits and impacts of its aviation-related tenants, the airport supports an industrial park which has 20 non-aviation tenants. The industrial park employs another estimated 800 persons. These jobs have an additional annual payroll of $14.3 million. These additional tenants are responsible for an estimated $57.6 in annual spending in the New Jersey economy. To envision the airport's total impact on the area economy, these additional impacts can be considered in conjunction with the noted below tenant and visitor impacts.

Summary

On an annual basis, Millville Municipal Airport's tenants and visitors provide the following total benefits:

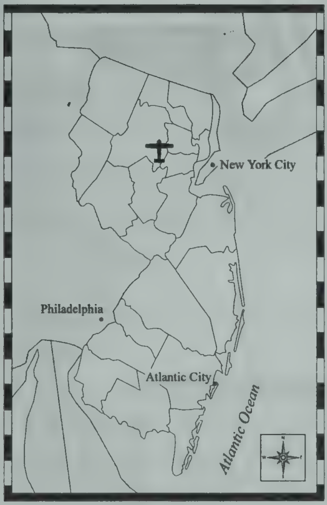
Jobs	Payroll	Output/Spending
1,476	$40.2 million	$185.5 million

Airport Location

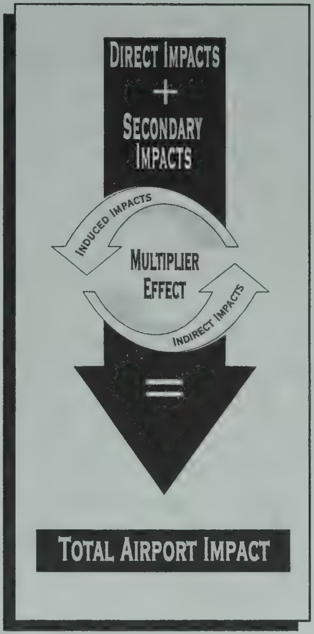
Morristown Municipal Airport is located in northern New Jersey three miles east of Morristown. The airport is located in Morris County and lies 24 miles west of New York City. Morristown Municipal Airport is located less than one mile from Interstate Highway 287, Interstate Highway 24, and State Route 10. Both the Newark and New York City central business districts are within an hour's drive, and Philadelphia's central business district is located less than two hours away.

Morristown Municipal Airport is publicly-owned and is operated by D.M. Airport Developers, Inc. The airport is home to over 204 single-engine, 62 multi-engine, and 45 jet engine aircraft. With the aid of a continuously staffed control tower, the airport logs over 225,000 operations a year.

Location Map



Identifying Economic Impacts



Customs services are located at the airport and operate during standard business hours (Monday to Friday, 8:00 a.m.- 4:00 p.m.). Morristown MunicipalAirport encompasses approximately 600 acres of land and has two main runways. Runway 5/23 is 5,999 feet in length, while Runway 12/30 is 3,998 feet in length. Both runways are equipped with runway lights and runway end identifier lights (REILs). Runway 5/23 has one precision (ILS RWY 23) and two nonprecision approaches (NDB RWY 5, NDB RWY 23), while Runway 12/30 has a visual approach.

Built in 1960, Morristown Municipal Airport has grown into a prime, public-use general aviation airport. The airport is a designated reliever airport.

DIRECT IMPACTS

In 1994, there were 31 aviation-related tenants on the airport who supported over 372 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $63.5 million annually. The estimated direct annual payroll of these tenants is $16.1 million. Survey data indicated that approximately 105,700 visitors used the airport in 1994. Approximately 80 percent of these visitors used the airport for business travel, while 20 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $26.4 million. This visitor-related output (spending) supported an additional 704 full-time jobs for employees earning $16.7 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	372	353.3	725.3
GA VISITORS	703.8	412.1	1,115.9
TOTAL	1,075.8	765.4	1,841.2

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$16,084,100	$11,108,000	$27,192,100
GA VISITORS	$16,680,100	$11,983,100	$28,663,200
TOTAL	$32,764,200	$23,091,100	$55,855,300

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$63,490,100	$45,004,700	$108,494,800
GA VISITORS	$26,396,300	$28,147,500	$54,543,800
TOTAL	$89,886,400	$73,152,200	$163,038,600

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Morristown Municipal Airport was approximately $163.0 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 1,841 persons, with a total annual payroll (direct and secondary) of approximately $55.9 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use Morristown Municipal Airport. Information from the business, visitor, and aircraft owner surveys reveals that the top business users of the airport fall into the following classifications: transportation, manufacturing, and professional services. Companies visiting from such states as Pennsylvania, Massachusetts, and New York use the airport as an alternative to Newark International Airport. Companies that frequently use Morristown Municipal Airport include Bausch & Lomb, Exxon Corporation, and Xerox Corporation. Some of the local companies that depend on the airport to serve arriving visitors include Allied Signal, Bell Atlantic, and Nabisco Corporation. Morristown Municipal Airport is essential to the day-to-day operation of many businesses. The airport allows businesses to visit clients, fly to areas that air carriers do serve, perform emergency service operations, and meet prospective customers arriving in the area.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The types of activity that occur at Morristown Municipal Airport on a regular basis include recreational flying and flight instruction. The airport also supports the USAF Special Missions Wing.

The airport serves as a valuable site for the medical community. Hospitals transport patients and human organs to various locations throughout the country. Local medical labs transport blood samples five days a week, and airport tenants utilize their aircraft for the Corporate Angel Network, a network designed to transport cancer patients free of charge.

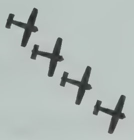
Morristown Municipal Airport will continue to grow due to the healthy business environment in the Morristown area, excellent highway access, and minimal air traffic delays. In addition, corporate hangar space is available; and with the large number of corporate facilities in the area, the potential for a corporate flight department relocating to Morristown Municipal Airport is excellent. The airport has an FAA Air Traffic Control Tower and a 24-hour U.S. Customs facility.

For the airport to continue to adequately serve the needs of its market area, however, consideration should be given to addressing wetland considerations, local opposition to noise, and the possible enhancement of the instrument approach to Runway 5.

SUMMARY

On an annual basis, Morristown Municipal Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
1,841	**$55.9 million**	**$163 million**

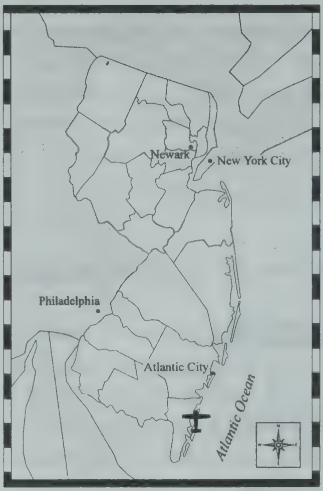


Airport Location

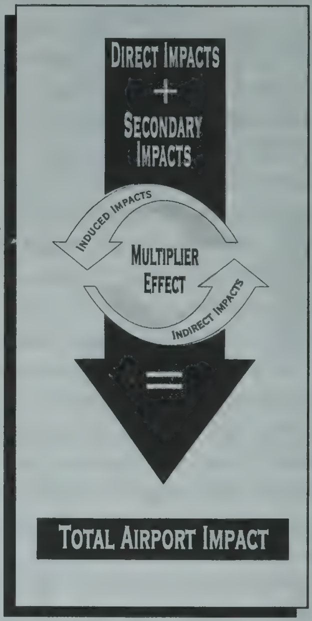
Ocean City Municipal Airport is located on the Jersey Shore in Ocean City, 10 miles south of Atlantic City, in Cape May County. Philadelphia lies 60 miles west, and New York City is situated 120 miles north of the airport. The airport is located less than two miles from Exit 25 on the Garden State Parkway.

Ocean City Municipal Airport is owned and operated by Ocean City. The airport, with approximately 35 based aircraft, experiences over 44,000 annual operations. The airport's single runway, Runway 6/24, measures 2,977 feet in length and is outfitted with a nonprecision approach (VOR RWY 6). In addition, the airport is served by a nonprecision circling approach (VOR A). Airport lighting includes low intensity runway lighting (LIRL) and a visual approach slope indicator (VASI) for Runway 24.

Location Map



Identifying Economic Impacts



Direct Impacts

In 1994, there were three aviation-related tenants on the airport who supported over 12 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $889,200 annually. The estimated direct annual payroll of these tenants is $276,800. Survey data indicated that approximately 15,700 visitors used the airport in 1994. Approximately 30 percent of these visitors used the airport for business travel, while 70 percent used the airport for personal-use. Direct output from general aviation visitors is estimated at an annual $2.9 million. This visitor related output (spending) supported an additional 76 full-time jobs for employees earning $1.8 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors to Ocean City Municipal Airport was approximately $7.4 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 142 persons, with a total annual payroll (direct and secondary) of approximately $3.6 million associated with these jobs.

EMPLOYMENT

	DIRECT+	SECONDARY=	TOTAL
AIRPORT TENANTS	12.0	9.5	21.5
GA VISITORS	76.0	44.5	120.5
TOTAL	88.0	54.0	142.0

PAYROLL

	DIRECT+	SECONDARY=	TOTAL
AIRPORT TENANTS	$276,800	$196,200	$473,000
GA VISITORS	$1,801,200	$1,294,000	$3,095,200
TOTAL	$2,078,000	$1,490,200	$3,568,200

OUTPUT

	DIRECT+	SECONDARY=	TOTAL
AIRPORT TENANTS	$889,200	$619,800	$1,509,000
GA VISITORS	$2,852,300	$3,041,500	$5,893,800
TOTAL	$3,741,500	$3,661,300	$7,402,800

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use Ocean City Municipal Airport as an alternative to Atlantic City International Airport. Information from the business, visitor, and aircraft owner surveys reveals that manufacturing and professional companies are the most frequent users of the airport. Business flights entering New Jersey at Ocean City Municipal most often originate from Pennsylvania and Maryland. Companies flying into and out of New Jersey via the Ocean City Municipal Airport include small to medium-sized businesses such as John A. Associates, Dick Summer Communications, and businesses associated with the Atlantic City gaming industry. Data from the surveys indicate that Ocean City Municipal Airport is important to the respondents' ability to conduct business in New Jersey. The airport allows easy access to companies not easily accessed by car, and it provides a greater degree of flexibility when last minute trips occur.

Airports contribute in many ways to the overall quality of life in the community they serve. The types of activities that occur at Ocean City Municipal Airport on a regular basis include recreational flying, flight instruction, traffic and news reporting, and "gateway" use by VIP's visiting the area.

Tourism remains strong in the Ocean City area and is expected to increase during the coming years. As tourism increases, more people will be arriving by aircraft. The airport, however, is encroached by surrounding businesses, residential development, and growing environmental concerns.

SUMMARY

On an annual basis, Ocean City Municipal Airport's tenants and visitors provide the following total benefits:

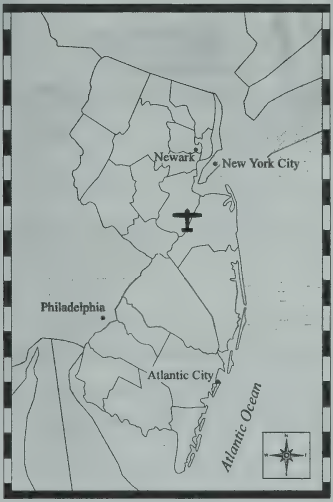
JOBS	PAYROLL	OUTPUT/SPENDING
142	$3.6 million	$7.4 million

AIRPORT LOCATION

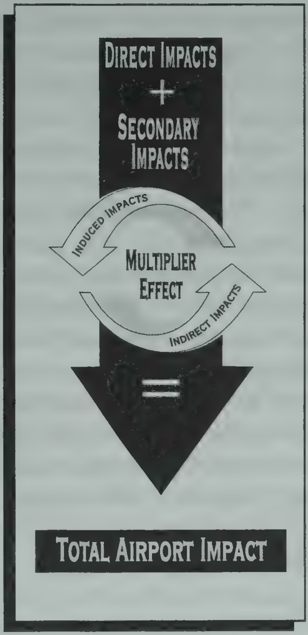
Old Bridge Airport is located in Old Bridge Township near the junction of State Route 9 and State Route 18. The airport is a privately-owned, privately-funded, public-use facility. The airport lies two miles north of Englishtown. The airport is owned by Madison Incorporated. Old Bridge Airport serves the mid-eastern New Jersey business community. The airport is located in a suburban area in Middlesex County, and it is advantageously located adjacent to a popular drag strip and Raceway Park. The airport serves Raceway Park well, due to its many visitors who arrive by air. The county is situated in a direct line between the cities of New York (to the east) and Philadelphia (to the west). The county also lies midway between Washington, D.C. and Boston.

Old Bridge Airport, with 74 based aircraft, experiences an estimated 21,500 annual operations. The airport has a single runway, Runway 6/24, with a nonprecision approach (VOR RWY 24). The runway measures 3,594 feet in length and is outfitted with medium intensity runway lighting (MIRL), runway end identifier lights (REILs), and visual approach slope indicators (VASIs). The airport has just undergone a refurbishment process that has yielded an additional seven rows of hangars and an office building.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Direct Impacts

In 1994, there were four aviation-related tenants on the airport who supported over seven employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $747,100 annually. The estimated direct annual payroll of these tenants is $203,600. Survey data indicated that approximately 600 visitors used the airport in 1994. Approximately 10 percent of these visitors used the airport for business travel, while 90 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $90,000. This visitor related output (spending) supported an additional two full-time jobs for employees earning $56,900 annually.

Secondary Impacts

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	7.5	7.4	14.9
GA VISITORS	2.4	1.4	3.8
TOTAL	9.9	8.8	18.7

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$203,600	$140,000	$343,600
GA VISITORS	$56,900	$40,800	$97,700
TOTAL	$260,500	$180,800	$441,300

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$747,100	$531,900	$1,279,000
GA VISITORS	$90,000	$96,000	$186,000
TOTAL	$837,100	$627,900	$1,465,000

Total Impacts

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Old Bridge Airport was approximately $1.5 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at approximately 19 persons, with a total annual payroll (direct and secondary) of approximately $441,300 associated with these jobs.

OTHER BENEFITS

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. At Old Bridge Airport, the types of activities that occur at the airport on a regular basis include aerial tours, flight instruction, and recreational flying. The airport also accommodates charter operators, and military operations. The airport serves as home base to approximately 75 aircraft.

Located in proximity to Old Bridge Airport are the New York Harbor, Statue of Liberty, and the Verrazano-Narrows Bridge. These attractions make the airport an excellent home for the open cockpit biplane based there for aerial sightseeing and banner towing. Tourists and visitors can also enjoy an unforgettable ride in a historic fighter aircraft around Sandy Hook and along the Jersey Shore. Raceway Park and Great Adventure are favorites among the tourists and guests brought by aircraft to the airport on an annual basis.

The airport shows good growth potential. Raceway Park, a drag strip and moto-cross race track, continues to draw large crowds to the area. In addition, the airport has added seven rows of hangars and additional office space. Since these additions, the airport's based aircraft and total operations have increased.

SUMMARY

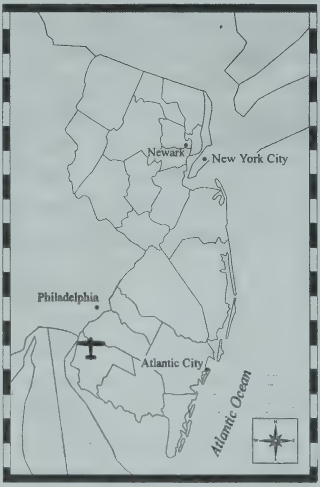
On an annual basis, Old Bridge Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
19	$441,300	$1.5 million

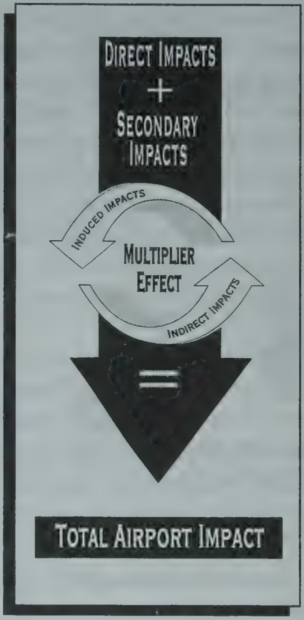
AIRPORT LOCATION

Oldmans Airport is located three miles south of the State's best known industrial parks and corporate centers in northern Salem County. The "Pureland" and "Mid-Atlantic" industrial parks are located in a 10-mile stretch known locally as the "Commodore Corridor" in Gloucester County, New Jersey. The airport parallels the New Jersey Turnpike, I-295, and the Delaware River. These industrial parks and Oldmans Airport, have easy access to the Delaware Memorial, Commodore Barry, and Walt Whitman bridges which connect New Jersey with the entire Philadelphia metropolitan area and Philadelphia International Airport. The local airport and industrial parks are located approximately midway between Washington, D.C. and New York City.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Oldmans Airport is the only remaining airport in this part of the State with a paved runway. Over 30 aircraft are based at the airport which has an estimated 10,000 operations. The airport is ideally located at the junction of Interstate Highway 295 (Exit 7) and Straughns Mill Road. Pureland Industrial Park lies three miles north of the airport and is accessible via Interstate Highway 295, Exit 10. The airport has a 2,455-foot long paved runway, Runway 7/25, with visual approaches at both ends of the runway. A full-length parallel taxiway serves the runway. Low intensity runway lighting (LIRL) permits night-time operations at the airport. TEK is the airport's fixed-base operator (FBO); they provide aircraft maintenance and fuel sales.

DIRECT IMPACTS

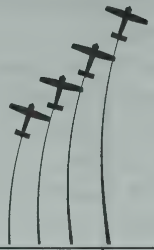
In 1994, there was one aviation-related tenant located on the airport. In order to preserve tenant confidentiality, total tenant and visitor impacts have been combined. This tenant's direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total combined direct output stemming from all on-airport tenants and general aviation visitors at Oldmans Airport was approximately $273,300. Total direct full-time employment related to airport tenants and general aviation visitors, is estimated at 7 persons, with a total direct payroll of approximately $137,800, annually. Survey data indicated that approximately 1,200 visitors used the airport in 1994. Approximately 10 percent of these visitors used the airport for business travel, while 90 percent used the airport for personal use.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

EMPLOYMENT

	DIRECT+	SECONDARY =	TOTAL
AIRPORT TENANTS	2.0	1.9	3.9
GA VISITORS	4.8	2.8	7.6
TOTAL	6.8	4.7	11.5



PAYROLL

	DIRECT+	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$137,800	$98,300	$236,100

OUTPUT

	DIRECT+	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$273,300	$258,400	$531,700

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Oldmans Airport is approximately $531,700. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 12 persons, with a total annual payroll (direct and secondary) of approximately $236,100 associated with these jobs.

OTHER BENEFITS

Discussions with the airport owner/manager and local pilots indicate that Oldmans Airport is used by both the recreational flyer and the business traveler. The airport is located in the southwestern portion of New Jersey and is the only paved airport in the region. The intrinsic recreational benefits provided by the airport are supported by the fact that the airport's low density development helps preserve green space and open areas in Salem County. The airport is used as an alternative to flying into Philadelphia International Airport.

Recreational pilots have indicated that the airport is very useful when visiting the area and attending the National Rodeo Championships held at Cow Town, New Jersey. Business users indicate a need for the airport when they are conducting business at the numerous industrial parks located throughout the area. In addition, the airport serves as home for pipeline inspections, maintenance, flight training, and as a gateway for high-profile visitors.

SUMMARY

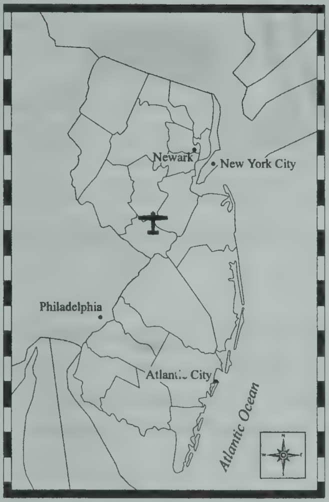
On an annual basis, Oldmans Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
12	**$236,100**	**$513,700**

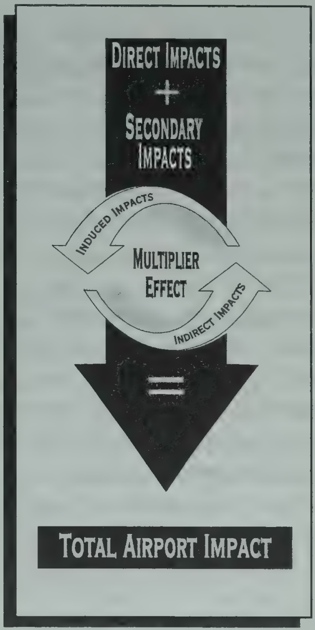
AIRPORT LOCATION

Princeton Airport is located in central New Jersey within the limits of Montgomery Township in Somerset County. The airport is located three miles north of Princeton on State Highway 206, eight miles north of Interstate Highway 295. Princeton Airport is owned and operated by Princeton Aero Corporation and has been designated as a reliever airport. The airport is in the center of the State where the State Route 1 corridor is the home for many national headquarters of very prestigious corporations. Somerset and nearby Mercer and Middlesex counties' location and high standard of living have made the area a center for world and national corporate headquarters, research firms, distributors, and light manufacturing operations.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Princeton Airport is home to over 130 single and multi-engine aircraft and averages approximately 75,000 operations a year. The airport is privately-owned and is situated on 50 acres of land. The airport has a single runway, Runway 10/28, with a nonprecision approach (VOR/DME RNAV RWY 10). The runway has a length of 3,099 feet and a width of 60 feet. The airport is outfitted with a full length taxiway, runway end identifier lights (REILs), and medium intensity runway lighting (MIRL). The airport offers a full range of services that include aircraft and helicopter rental, instruction, and charter. The field has indoor and outdoor aircraft storage, maintenance, fuel sales, and a pilot shop.

DIRECT IMPACTS

In 1994, there were three aviation-related tenants on the airport who supported over 46 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $2.8 million annually. The estimated direct annual payroll of these tenants is $925,900. Survey data indicated that approximately 9,600 visitors used the airport in 1994. Approximately 40 percent of these visitors used the airport for business travel, while 60 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $1.9 million. This visitor related output (spending) supported an additional 50 full-time jobs for employees earning $1.2 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	46.5	45.6	92.1
GA VISITORS	50.3	29.5	79.8
TOTAL	96.8	75.1	171.9

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$925,900	$636,800	$1,562,700
GA VISITORS	$1,192,100	$856,500	$2,048,600
TOTAL	$2,118,000	$1,493,300	$3,611,300

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$2,777,000	$1,977,100	$4,754,100
GA VISITORS	$1,885,500	$2,010,600	$3,896,100
TOTAL	$4,662,500	$3,987,700	$8,650,200

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Princeton Airport was approximately $8.7 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 172 persons, with a total annual payroll (direct and secondary) of approximately $3.6 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use the Princeton Airport. Information from the business, visitor, and aircraft owner surveys reveals that professional services, transportation, and manufacturing industries are the top business users of the airport. These industries are typically using the airport as an alternative to flying into larger airports, such as Newark and Philadelphia International airports. Businesses visiting the airport tend to be based in Massachusetts, New York, and Pennsylvania. Companies flying into New Jersey via Princeton Airport include Berksire Aviation, Amherst College, and National Systems Software. Major corporations who use corporate aircraft to conduct business in the region also include Dow Jones, Merrill Lynch, McGraw-Hill, and 3M. High tech companies and research concerns located along the popular State Route 1 Corridor, along with Princeton and Rutgers Universities, are also served by the Princeton Airport. The airport is often host to Marine One and foreign dignitaries due to the ease of securing the airport for VIP arrivals. Data from the surveys indicate that Princeton Airport is important to the respondents' ability to conduct business in New Jersey. Respondents indicated that by using corporate aircraft time is saved on business ventures (i.e., less travel time, more sales calls, and the ability to canvass larger areas).

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The types of activities that occur at Princeton Airport on a regular basis include aircraft and helicopter flight instruction, business and recreational flying, and helicopter and aircraft charter. The airport also accommodates the following aviation-related activities: New Jersey State Police (medivac), law enforcement services, New Jersey Forest Fire Service, and various emergency medical services.

The airport is open to the community at all times and regularly holds special activities for safety, educational, and charitable purposes.

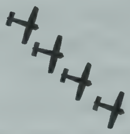
Every year the airport sponsors an open house with a variety of aviation-related activities. At holiday time, the operators sponsor a "Food for the Needy" drive. Prior to Christmas, the airport gathers gifts for area children which Santa flys in, in an airplane. Participants must also bring a gift for the needy for distribution prior to Christmas. Through this program, thousands of gifts have been collected and distributed by the county Social Services. Regular tours are conducted for young and old during good weather; and twice a year, the airport in conjunction with the FAA sponsors Safety-Education Seminars.

The airport's flight school is an FAA certified flight school with approved curricula from the private pilot through airline transport courses. In addition to the students who are training for a vocation or avocation, students come from far and wide because the school is approved for veteran training, workforce retraining, and by Immigration and Naturalization for foreign students to train with student visas.

SUMMARY

On an annual basis, Princeton Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
172	**$3.6 million**	**$8.7 million**

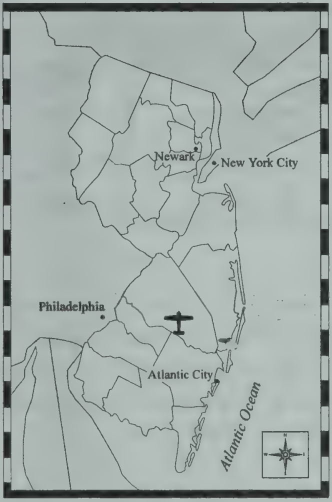


AIRPORT LOCATION

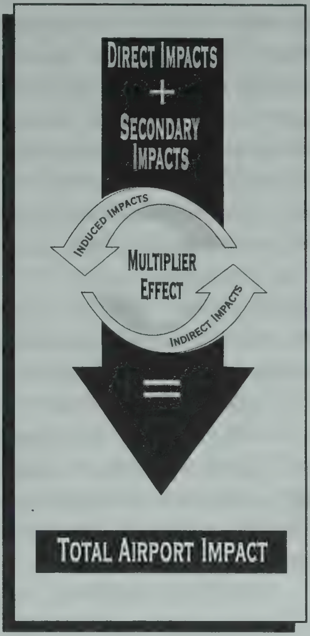
Red Lion Airport is located in the greater Philadelphia metropolitan area in Southampton Township, New Jersey. The airport is situated in Burlington County and lies two miles south of Vincentown. Red Lion Airport is a privately-owned, public-use general aviation airport. The 95-acre airport is well-maintained in a rural setting that is surrounded by agricultural land use. This setting, together with the low traffic volume in the area, makes the airport an ideal training site for novice pilots and the weekend flyer. Red Lion Airport's location is also an attractive feature to aerobatic and hot air balloon pilots.

Good highway access is available to the airport from all directions along the northeast corridor of Philadelphia. The airport is located 14 miles from Exit 4 on the New Jersey Turnpike and 15 miles from Interstate Highway 295. The Philadelphia Central Business District (CBD) is a 35-minute drive from the airport, New York is one and one-half hours north, and Baltimore is one and one-half hours south. Most points within the Delaware Valley are located less than 45 minutes by automobile from the airport.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Red Lion Airport has one runway, Runway 5/23, which measures 2,880 feet in length and 43 feet in width. A full length taxiway services aircraft using this runway. The approaches on both runway ends are visual, although a nonprecision circling VOR-A approach is provided. Medium intensity runway lighting (MIRL) provides navigational aid for night-time operations. The airport experiences 18,000 annual operations and has 80 based aircraft. The airport is planning to add additional T-hangars.

DIRECT IMPACTS

In 1994, there were three aviation-related tenants on the airport who supported over 4 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $434,000 annually. The estimated direct annual payroll of these tenants is $140,800. Survey data indicated that approximately 400 visitors used the airport in 1994. Approximately 10 percent of these visitors used the airport for business travel, while 90 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $64,500. This visitor related output (spending) supported an additional two full-time jobs for employees earning $40,300 annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	4.5	4.4	8.9
GA VISITORS	1.7	1.0	2.7
TOTAL	6.2	5.4	11.6

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$140,800	$96,800	$237,600
GA VISITORS	$40,300	$28,900	$69,200
TOTAL	$181,100	$125,700	$306,800

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$434,000	$309,000	$743,000
GA VISITORS	$64,500	$68,800	$133,300
TOTAL	$498,500	$377,800	$876,300

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Red Lion Airport was approximately $876,300. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 12 persons, with a total annual payroll (direct and secondary) of approximately $306,800 associated with these jobs.

OTHER BENEFITS

Information from the business, visitor, and aircraft owner surveys indicate that although the Red Lion Airport is mainly used by the recreational aviator, it is also occasionally used by business aircraft. Information from the business, visitor, and aircraft owner surveys reveals that the manufacturing industry is the top business user of the airport. Data from the visitor survey indicate that Red Lion Airport is used as a training alternative to South Jersey Regional Airport and Flying W Airport. The businesses that use the airport are most often located in the northeastern United States. Businesses indicate that the airport allows for faster response to client needs and helps them find new clients by expanding their market areas.

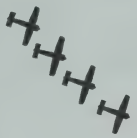
Red Lion Airport's main contribution is to the recreational pilot and to the community surrounding the airport. The airport supports over 80 privately-owned aircraft, a flight school, and a location for a firefighting branch of the New Jersey Department of Forestry. The Forestry Department uses the airport as a refueling stop. In addition, during the past two years, the airport has served as a site for medivac flights on several occasions.

Some of the other beneficial uses of the airport's facilities include storage of antique/classic aircraft. This activity contributes to the preservation of our nation's aviation history. Aircraft based at Red Lion Airport include crop dusters who use their general aviation aircraft to preserve the region's agricultural industry. The value added to New Jersey agriculture from the activities of these crop dusters is significant.

SUMMARY

On an annual basis, Red Lion Airport's tenants and visitors provide the following total

JOBS	PAYROLL	OUTPUT/SPENDING
12	$306,800	$876,300

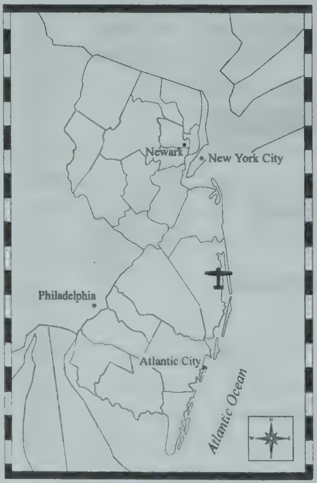


AIRPORT LOCATION

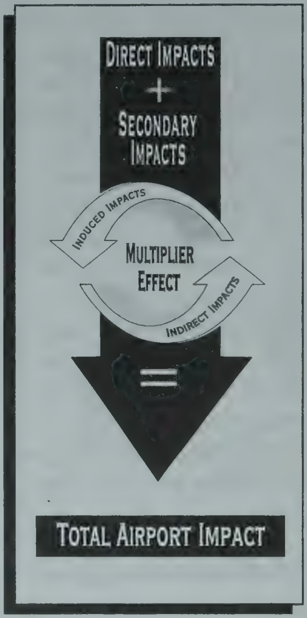
Robert J. Miller Airpark is located near Toms River, New Jersey, five miles west of the Garden State Parkway. The airpark is located in the Pine Barrens in the central portion of Ocean County, in Berkeley Township. Philadelphia is an hour away, New York is approximately one and one-half hours north, and Atlantic City is an hour's drive to the south.

The Robert J. Miller Airpark is a premiere, publicly-owned, public-use general aviation airport which is owned and operated by the County of Ocean. Robert J. Miller Airpark serves the southern New Jersey business community. The airpark's proximity to tourist attractions and activities, such as the Jersey Shore Golden, makes the airpark a valuable transportation asset for visitors and nearby businesses.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Corporations headquartered outside New Jersey use general aviation aircraft as a reliable means of quickly moving personnel. Companies using Robert J. Miller Airpark include Wal-Mart, KMart, Cherokee Rubber Company, and Revlon. Robert J. Miller Airpark provides the rapid transportation necessary for the region's businesses to effectively compete in the national marketplace.

Robert J. Miller Airpark has 100 based aircraft and experiences 35,500 annual operations. The airpark has one runway, Runway 6/24, that measures 5,949 feet in length. This runway is outfitted with a precision approach (ILS RWY 6) and two nonprecision approaches (VOR RWY 6, VOR RWY 24). Navigational aids available at the airport include high intensity runway lighting (HIRL), visual approach slope indicators (VASIs), and runway end identifier lights (REILs). The runway also has medium intensity approach lighting system with runway alignment indicator lights (MALSR) for Runway 6. The airpark plans to widen the runway to 100 feet during the summer of 1996.

DIRECT IMPACTS

In 1994, there was one aviation-related tenant located on the airport. In order to preserve tenant confidentiality, total tenant and visitor impacts have been combined. This tenants' direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total combined direct output stemming from all on-airport tenants and general aviation visitors to Robert J. Miller Airpark was approximately $3.9 million. Total direct full-time employment related to airport tenants and general aviation visitors is estimated at an annual 70 persons, with a total direct payroll of approximately $1.7 million, annually. Survey data indicated that approximately 7,700 visitors used the airport in 1994. Approximately 60 percent of these visitors used the airport for business travel, while 40 percent used the airport for personal use.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	24.0	23.5	47.5
GA VISITORS	45.6	26.7	72.3
TOTAL	69.6	50.2	119.8

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$1,731,100	$1,223,700	$2,954,800

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$3,909,200	$3,389,500	$7,298,700

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Robert J. Miller Airpark was approximately $7.3 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 120 persons, with a total annual payroll (direct and secondary) of approximately $3.0 million associated with these jobs.

OTHER BENEFITS

Information from the business, visitor, and aircraft owner surveys indicate that although R.J. Miller Airpark is used by the recreational aviator, it is also used by business aircraft. Information from the surveys shows that retail, service, and wholesale companies are the top business users of the airpark. Data from the visitor survey indicate that R.J. Miller Airpark is used as an alternative to Allaire Airport. Companies using the airpark are based mainly in the northeast. Some of the other beneficial uses of the airpark's facilities include storage of antique/classic aircraft; this activity contributes to the preservation of our nation's aviation history. Aircraft based at Robert J. Miller Airpark include crop dusters who use their general aviation aircraft to preserve the region's agricultural industry. The value added to New Jersey agriculture from the activities of these crop dusters is significant. Data from the business survey indicate that R.J. Miller Airpark is important to the respondents' ability to conduct business by allowing local companies greater speed and flexibility during business trips and better client interaction.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. R.J. Miller Airpark is home base for 100 aircraft, offers flight instruction, and provides real estate tours to prospective home buyers. The airpark also serves the area's recreational needs by providing facilities for recreational and weekend flyers.

R.J. Miller Airpark shows potential for growth. As the area's population increases, the airpark should benefit by increases in recreational pilots and additional students. The airpark's sponsor has recently made several capital improvements, including drainage improvements and additional aircraft storage. Future plans for the airpark include the addition of a crosswind runway. Airpark expansion may be limited by the Pine Barrens Conservation District surrounding the airpark.

SUMMARY

On an annual basis, Robert J. Miller Airpark's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
120	$3.0 million	$7.3 million

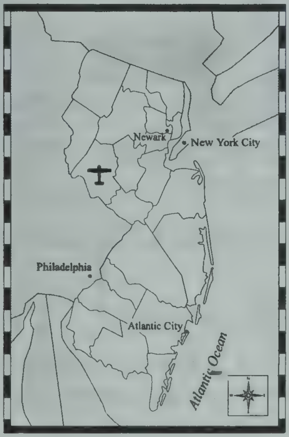
AIRPORT LOCATION

Sky Manor Airport is located in Pittstown near the junction of Interstate Highway 78 and State Route 31 in Hunterdon County, New Jersey. The airport is located less than 55 miles away from Philadelphia, New York City, and Newark. The airport is privately-owned, but it is a public-use facility. Sky Manor Airport covers 60 acres. Hunterdon County is situated halfway between New York City and Philadelphia. The county is bisected by Interstate Highway 78, allowing easy access to Newark International Airport and Port Elizabeth. Recent highway development has given Hunterdon County a high degree of accessibility to the East Coast megalopolis and, thereby, to national markets.

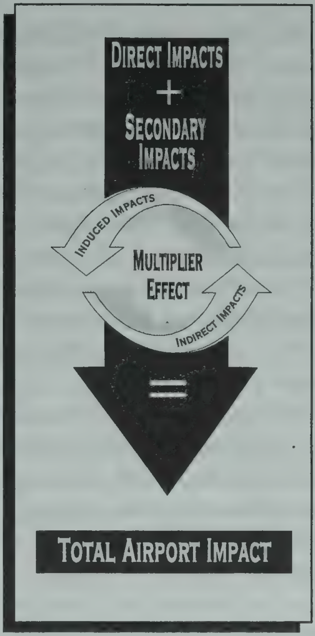
Sky Manor is an exceptionally well-maintained airport, and it is ideal for recreational and student flying and other aviation-related activities such as skydiving. The airport's proximity to tourist attractions, such as Spruce Run Aquatic area and the Flemington shopping outlet, makes it a valuable transportation asset for visitors to the area.

Sky Manor Airport is home to over 90 aircraft and experiences over 46,000 operations a year. The airport has a single runway, Runway 7/25, with a nonprecision approach (VOR RWY 7). The runway has a length of 2,438 feet and a width of 52 feet. In addition, the airport is outfitted with a full length taxiway and low intensity runway lighting (LIRL).

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



DIRECT IMPACTS

In 1994, there were three aviation-related tenants on the airport who supported over 39 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $2.1 million annually. The estimated direct annual payroll of these tenants is $758,600. Survey data indicated that approximately 10,300 visitors used the airport in 1994. Approximately 30 percent of these visitors used the airport for business travel, while 70 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $1.9 million. This visitor related output (spending) supported an additional 50 full-time jobs for employees earning $1.2 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	39.5	38.8	78.3
GA VISITORS	49.8	29.1	78.9
TOTAL	89.3	67.9	157.2

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$758,600	$521,700	$1,280,300
GA VISITORS	$1,180,300	$847,900	$2,028,200
TOTAL	$1,938,900	$1,369,600	$3,308,500

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$2,082,900	$1,482,900	$3,565,800
GA VISITORS	$1,866,800	$1,990,600	$3,857,400
TOTAL	$3,949,700	$3,473,500	$7,423,200

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Sky Manor Airport was approximately $7.4 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 157 persons, with a total annual payroll (direct and secondary) of approximately $3.3 million associated with these jobs.

Other Benefits

Data supplied by this study's survey efforts indicate that although the Sky Manor Airport is used by recreational flyers, it is also used by businesses. Information from the business, visitor, and aircraft owner surveys reveals that manufacturing and service companies are the typical employers that use the airport for business. The companies flying into the airport are from various areas of the United States. Some of the more notable companies using the airport for business include Exxon Research, True Insurance Company, and other small and independent businesses. Businesses indicate that the airport is helpful to them because it allows them to visit areas not served by commercial airlines, it allows important time-sensitive equipment to be transported, and it provides a more efficient way of serving clients.

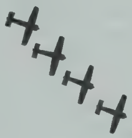
Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The types of activities that occur at Sky Manor Airport on a regular basis include airplane and helicopter training, recreational flying, and "gateway" use by VIPs. The airport also hosts a branch of the Seaplane Pilot's Association. In addition, in May 1994, local pilot Ken Johnson participated in an around-the-world air race that spread goodwill throughout the world.

The owner of Sky Manor Airport is very dedicated to recreational flying; with tourism being New Jersey's second largest industry, the airport meets this market's needs. The airport is situated in a great location, with New York City less than one hour's drive away, and tremendous scenery just minutes away by plane. As the area continues to grow, so will the airport.

Summary

On an annual basis, Sky Manor Airport's tenants and visitors provide the following total benefits:

Jobs	Payroll	Output/Spending
157	$3.3 million	$7.4 million

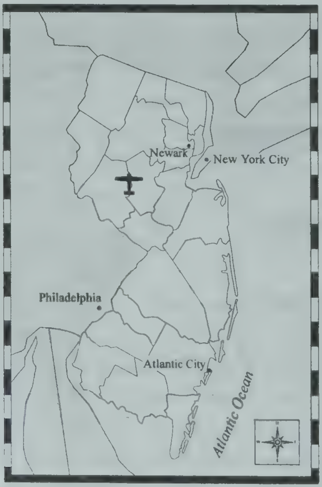


AIRPORT LOCATION

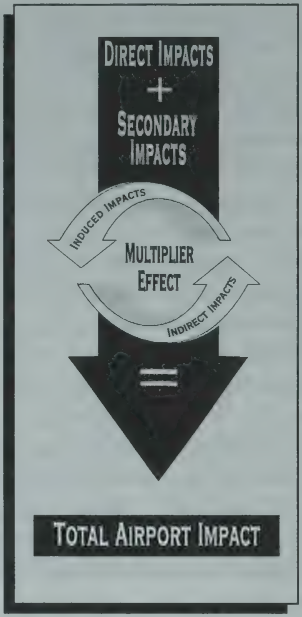
Solberg-Hunterdon Airport is located in Readington Township, New Jersey. Solberg-Hunterdon Airport is a public-use general aviation airport. The airport is owned by Solberg Aviation Company and operated by Solberg Aviation Co., Inc. The airport is located one mile northwest of the City of Readington. The airport is situated in Hunterdon County, which is halfway between New York City and Philadelphia. The county is bisected by Interstate Highway 78, allowing easy access to Newark International Airport and Port Elizabeth. Recent highway development has given Hunterdon County a high degree of accessibility to the East Coast megalopolis and, thereby, to the national economy.

Solberg-Hunterdon Airport encompasses approximately 727 acres of land and has four runways. Runway 4/22 is an asphalt/turf strip that measures 3,735 feet in length and 183 feet in width. This runway is equipped with medium intensity runway lighting (MIRL). Runway 10/28 is a turf strip that is 2,456 feet long and 160 feet wide. Runway 13/31 is also a turf strip that is 3,440 feet long and 200 feet wide. Runway 3/21, a recent addition to the airport, measures 2,000 feet in length and 250 feet in width; this runway is classified as restricted use and is primarily used for glider operations. The airport has a two nonprecision approaches (VOR/DME RWY4, VOR A). The airport supports 100 based aircraft and has approximately 87,000 annual operations. The airport is a designated reliever airport.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



DIRECT IMPACTS

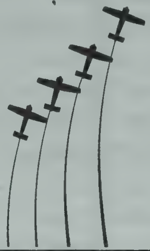
In 1994, there was one aviation-related tenant located on the airport. In order to preserve tenant confidentiality, total tenant and visitor impacts have been combined. This tenants' direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total combined direct output stemming from all on-airport tenants and general aviation visitors at Solberg-Hunterdon Airport was approximately $5.0 million. Total direct full-time employment related to airport tenants and general aviation visitors, is estimated at 130 persons, with a total direct annual payroll of approximately $2.9 million. Survey data indicated that approximately 21,200 visitors used the airport in 1994. Approximately 40 percent of these visitors used the airport for business travel, while 60 percent used the airport for personal use.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	19.0	18.7	37.7
GA VISITORS	110.9	64.9	175.8
TOTAL	129.9	83.6	213.5



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$2,867,800	$2,053,000	$4,920,800

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$4,961,100	$5,006,700	$9,967,700

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Solberg-Hunterdon Airport was approximately $10.0 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 214 persons, with a total annual payroll (direct and secondary) of approximately $4.9 million associated with these jobs.

Other Benefits

Data supplied by this study's survey efforts indicate businesses occasionally use Solberg-Hunterdon Airport as an alternative to Morristown Municipal Airport. Information from the business, visitor, and aircraft owner surveys reveals that the top business users of the airport fall into the following classifications: professional, construction, and manufacturing. Companies flying into New Jersey via the airport are primarily located east of the Mississippi River. Businesses flying into the airport include Carnes Communications Inc.; Gates Construction; Vojecard Properties; Enzon Inc.; Merck and Co., Inc.; and Rebtex, Inc. The surveys indicate that incoming companies conduct business with Ortho-McNeil Pharmaceuticals, Structural Foam Plastics, and Great Lakes Dredge and Dock. Data from the business survey indicate that Solberg-Hunterdon Airport is important to the respondents' ability to conduct business by allowing shorter commute times to trade shows in Atlantic City, less expensive travel than scheduled airline service, and a safer means of traveling throughout New Jersey.

Solberg Airport encourages community involvement in planning for the future. The airport is an active member of the local community of Readington Township, and the airport has an active public education process. The airport has opened its doors for events, community support activities, educational tours, and classes that benefit all citizens of Hunterdon County and neighboring Somerset County. The airport is located on 727 acres that provide open space and woodlands. The Airport Appreciation Hunting Club, which is made up of local residents, enjoys seasonal hunting at the airport. In addition, the airport serves as a site for emergency medical transport, forest firefighting activities, and aerial photography.

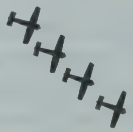
The New Jersey Festival of Ballooning is one of the country's largest hot air ballooning events and attracts 150,000 visitors annually to the Hunterdon and Somerset County region. The festival contributes in excess of $100,000 to local community charities and service groups.

Solberg-Hunterdon Airport recognizes that today's airport must be a safe, effective multi-purpose facility that maintains community compatibility. Continuous planning at the airport includes a published Noise Abatement Program. Future development is geared toward satisfying the growing needs of both business and recreational flying. The airport plays a key role in the economic future of Readington Township and Hunterdon and Somerset counties.

Summary

On an annual basis, Solberg-Hunterdon Airport's tenants and visitors provide the following total benefits:

Jobs	Payroll	Output/Spending
214	$4.9 million	$10 million

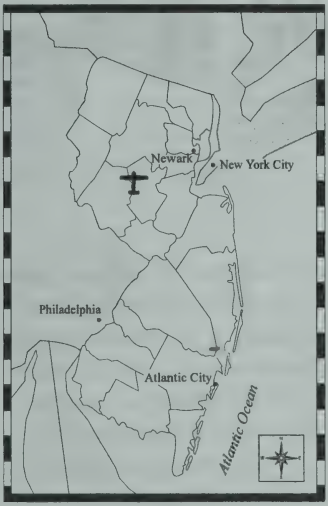


AIRPORT LOCATION

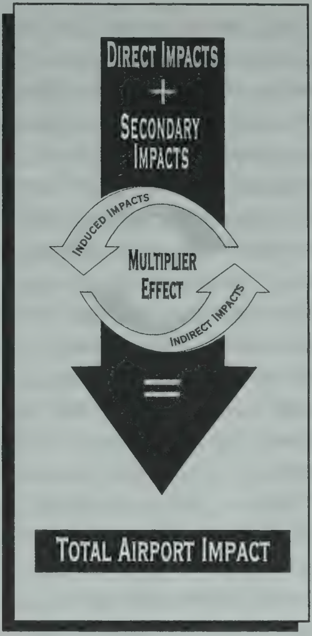
Somerset Airport is located in central New Jersey in the Township of Bedminster, five miles from the county seat of Somerville. The airport is in Somerset County, and it lies 39 miles southwest of New York City. Good highway access is available from all directions to the airport. Somerset Airport is located less than five miles from State Routes 202, 206, and 22 and less than three miles from Interstates 287 and 78. The Newark and New York City business districts are located less than an hour's drive away, and Philadelphia is a one and one-half hour drive away. Somerset County's location and high standard of living have made it a center for world and national corporate headquarters, research firms, distributors, and light manufacturing operations.

Founded in 1946, Somerset Airport, which is a privately-owned, public-use general aviation facility, is operated by Somerset Air Service, Inc. The airport is a designated reliever. The airport serves the central New Jersey area. The 200-acre airport is an exceptionally well-maintained airport which supports student and glider flying, as well as other recreational flying. The airport environs are still rural, yet growing communities surrounding the airport make it a valuable transportation asset for nearby businesses.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Somerset Airport is home to almost 170 single-engine and multi-engine aircraft. The airport logs over 95,000 operations a year. Somerset Airport has three runways with two nonprecision approaches (VOR RWY 8, RNAV RWY 12) and runway lengths of less than 2,800 feet. The airport is outfitted with a taxiway system that serves all three runways. Runway 12/30 is equipped with low intensity runway lighting (LIRL).

DIRECT IMPACTS

In 1994, there was one aviation-related tenant located on the airport. In order to preserve tenant confidentiality, total tenant and visitor impacts have been combined. This tenants' direct or first round employment, payroll, and output impacts were derived from survey data. For 1994, the total combined direct output stemming from all on-airport tenants and general aviation visitors at Somerset Airport was approximately $5.3 million. Total direct full-time employment related to airport tenants and general aviation visitors, is estimated at 126 persons, with a total direct annual payroll of approximately $3.0 million. Survey data indicated that approximately 17,300 visitors used the airport in 1994. Approximately 70 percent of these visitors used the airport for business travel, while 30 percent used the airport for personal use.

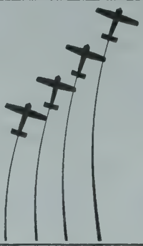
SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

EMPLOYMENT

DIRECT + SECONDARY = TOTAL

	DIRECT	SECONDARY	TOTAL
AIRPORT TENANTS	18.0	17.6	35.6
GA VISITORS	107.8	63.1	170.9
TOTAL	125.8	80.7	206.5



PAYROLL

DIRECT + SECONDARY = TOTAL

	DIRECT	SECONDARY	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$3,004,900	$2,144,900	$5,149,800

OUTPUT

DIRECT + SECONDARY = TOTAL

	DIRECT	SECONDARY	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$5,306,800	$5,210,500	$10,517,300

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors to Somerset Airport is approximately $10.5 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 207 persons, with a total annual payroll (direct and secondary) of approximately $5.1 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use Somerset Airport as an alternative to the area's larger international airports located in Newark and Philadelphia. Information from the business, visitor, and aircraft owner surveys reveals that professionals are the top business users of the airport. Businesses that fly into New Jersey via the Somerset Airport are primarily originating in New York and Pennsylvania. Local companies that benefit by having their visitors utilize the airport include McDonalds Corporation, Chubb Insurance, Merck, Met Life, Beneficial, and A.M. Best. Companies flying into Somerset Airport to conduct business include Aetna Life and Casualty and Bottom Line Technologies. AT&T, located within four miles of the airport, also relies on the airport for corporate travel. Data from the business surveys indicate that Somerset Airport is important to the respondent's ability to conduct business by saving large amounts of travel time and allowing for quick contact.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The Somerset Airport has been used as a "gateway" by VIP's from the East Coast, provides flight training and charter activities, and serves as home base for 170 aircraft.

Somerset Airport serves as the site for significant aviation-related services such as beginning and advanced flight education for future pilots. The airport has had past training contacts with Rutgers University, Army ROTC, and Pan Am. With a history that spans five decades, many aviation professionals, both civilian and military, have initially learned to fly at Somerset. Many other professional and public organizations such as the New Jersey Forest Fire Service, the New Jersey State Police, and medivac take full advantage of Somerset's facilities.

The owners of Somerset Airport, who live in the community, have always endeavored to welcome the local schools, scout troops, senior citizens, and other groups to come and tour. To promote good relations, the airport offers a free ride to any prospective home buyer in the immediate area of the airport. The airport has established two significant scholarships at two high schools serving the immediate community for students making aviation-oriented career choices.

The ability of the airport to expand to serve the needs of its market area is constrained. Developers in the area have bought the land surrounding the airport, and this may impede or prevent extension of the airport's runway. Land use controls are needed to prevent further incompatible development in the airport environs.

SUMMARY

On an annual basis, Somerset Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
207	**$5.2 million**	**$10.5 million**

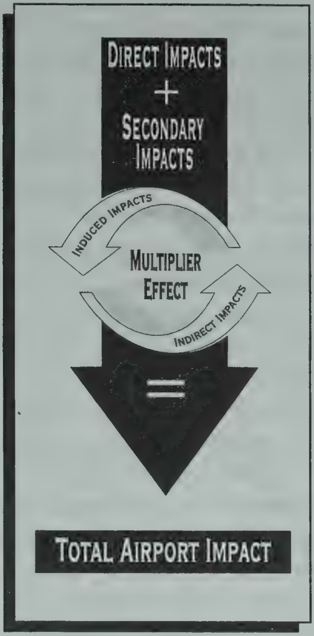
AIRPORT LOCATION

South Jersey Regional Airport is located in the greater Philadelphia metropolitan area in Lumberton Township, New Jersey. The airport is situated in Burlington County, and it lies three miles north of the Town of Medford. Good highway access is available from all directions along the northeast corridor of Philadelphia. The airport is situated seven miles from the New Jersey Turnpike and three and a half miles from Interstate Highway 295. Philadelphia is a 30-minute drive; New York City and Baltimore are both one and one-half hours away.

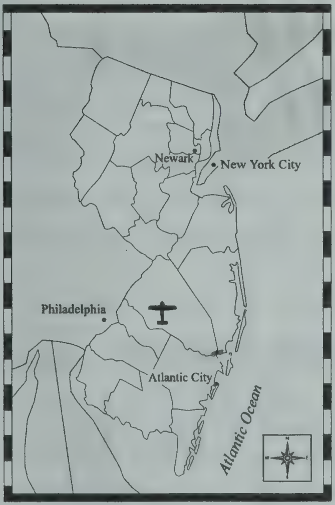
South Jersey Regional Airport, owned by Aviation Industrial Realty Corporation (AIRCORP), is a designated reliever airport for Philadelphia International Airport. The airport is base for over 180 private and corporate aircraft. Recognizing the existing and potential industrial activities attracted by the airport, Lumberton Township created an Airport Industrial Zoning District in its 1994 Master Plan. The airport experiences over 58,000 operations on an annual basis. The airport has a single runway with a nonprecision approach (VOR RWY 26). Runway 8/26 has a length of 3,911 feet. The airport is equipped with low intensity runway lighting (LIRL).

In addition to the tenant and visitor related benefits described in the following section, there is also one non-aviation tenant located at the airport. This tenant employs more than three people who earn $138,600 a year. This additional tenant is responsible for $249,550 in annual output.

IDENTIFYING ECONOMIC IMPACTS



LOCATION MAP



DIRECT IMPACTS

In 1994, there were 32 aviation related tenants on the airport who supported 72 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation related tenants is estimated at $6.7 million annually. The estimated direct annual payroll of these tenants is $2.2 million. Survey data indicated that approximately11,400 visitors used the airport in 1994. Approximately 50 percent of these visitors used the airport for business travel, while 50 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $2.4 million. This visitor related output (spending) supported an additional 64 full-time jobs for employees earning $1.5 million annually.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	72.0	70.5	142.5
GA VISITORS	63.9	37.4	101.3
TOTAL	135.9	107.9	243.8

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$2,247,400	$1,546,300	$3,793,700
GA VISITORS	$1,514,400	$1,088,000	$2,602,400
TOTAL	$3,761,800	$2,634,300	$6,396,100

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$6,766,400	$4,817,000	$11,583,400
GA VISITORS	$2,398,500	$2,557,600	$4,956,100
TOTAL	$9,164,900	$7,374,600	$16,539,500

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at South Jersey Regional Airport was approximately $16.5 million.

Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 244 persons, with a total annual payroll (direct and secondary) of approximately $6.4 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use South Jersey Regional Airport. Information from the business, visitor, and aircraft owner surveys shows that the top business users of the airport fall into the following classifications: manufacturing, transportation, and professional services. Data from the visitor survey indicate that South Jersey Regional Airport is used as an alternative to both the Philadelphia International and Camden County airports. Flights arriving via South Jersey Regional Airport most often originate from the eastern part of the United States. Companies using South Jersey Regional Airport include Inductotherm, Suite-Kote Corp., and Citco. Business using the airport indicate that their use of the airport allows them to enlarge their sales base, to have a more flexible travel schedule, and to improve their ability to attend meetings in areas that are not served by commercial airlines.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The Air Victory Museum, with a collection of various aircraft, is located at South Jersey Regional Airport. The museum will exhibit, store, and restore various air and space vehicles, while promoting technological and industrial sciences. The Air Victory Museum, in cooperation with the local Chapter of Experimental Aircraft Association, introduced over 500 children last year to their first airplane ride through the FAA Young Eagle program. In addition, the airport is home to over 180 aircraft and two flight schools.

The airport supports the operations of the New Jersey State Police in both law enforcement (prisoner transport) and medivac operations; the New Jersey Forest Fire Service also uses the airport, as does the Civil Air Patrol. Another beneficial use of aircraft based at the airport includes a local cardiologist at Cooper Hospital who commutes between hospitals. The airport also hosts CPR classes for the community, an annual air fair and air show, tours for local elementary schools, and activities of the Make-a-Wish foundation.

South Jersey Regional Airport will continue to grow because the owners are dedicated to the long-term development of the facility. The airport has grown from 18 based aircraft in 1988 to over 180 based aircraft in 1994. The airport's master plan calls for many capital improvements, including a new runway 5,800 feet long by 100 feet wide.

SUMMARY

On an annual basis, South Jersey Regional Airport's tenants and visitors provide the following total benefits:

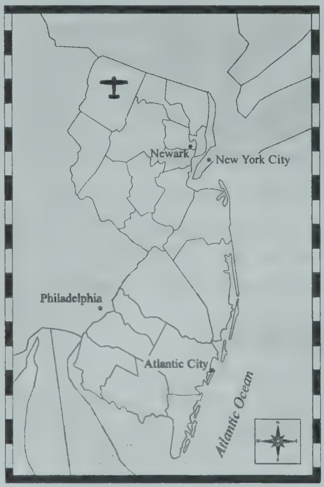
JOBS	PAYROLL	OUTPUT/SPENDING
244	$6.4 million	$16.5 million

AIRPORT LOCATION

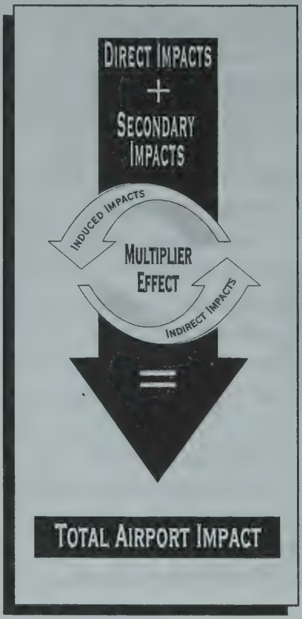
Sussex Airport is situated in the upper northwest corner of New Jersey, in Wantage Township. The airport is located in Sussex County, and it lies 11 miles south of New York State. Highway access is available from State Route 23 and State Route 284. New York City and Newark are both situated approximately 50 miles to the east, Philadelphia is 120 miles to the south, and Atlantic City is situated 164 miles to the southeast.

The 96-acre airport is well-maintained and is ideal for recreational and student flying and other airborne activities, such as skydiving. The airport's proximity to tourist attractions such as the Vernon Valley ski area, the Space Wild Animal Farm, and High Point and Stokes State parks, makes it a valuable transportation asset.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



The airport has approximately 150 based aircraft and approximately 67,000 annual operations occur at the airport. The airport is a designated reliever. The airport has a single runway, Runway 3/21, with runway end identifier lights (REILs), medium intensity runway lighting (MIRL), and a runway length of 3,499 feet. A full length taxiway also serves the runway. In addition, a circling nonprecision approach serves the airport (VOR A). The airport has recently repaved its runway.

DIRECT IMPACTS

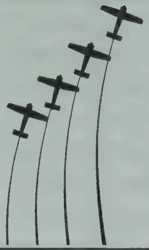
In 1994, there were four aviation related tenants on the airport who supported over 14 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation related tenants is estimated at $1.0 million annually. The estimated direct annual payroll of these tenants is $328,900. Survey data indicated that approximately 4,200 visitors used the airport in 1994. Approximately 30 percent of these visitors used the airport for business travel, while 70 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $765,000. This visitor related output (spending) supported an additional 20 full-time jobs for employees earning $483,500 annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	14.5	14.3	28.8
GA VISITORS	20.4	11.9	32.3
TOTAL	34.9	26.2	61.1



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$328,900	$226,200	$555,100
GA VISITORS	$483,500	$347,400	$830,900
TOTAL	$812,400	$573,600	$1,386,000

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$1,014,900	$722,600	$1,737,500
GA VISITORS	$765,000	$815,700	$1,580,700
TOTAL	$1,779,900	$1,538,300	$3,318,200

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Sussex Airport was approximately $3.3 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 61 persons, with a total annual payroll (direct and secondary) of approximately $1.4 million associated with these jobs.

OTHER BENEFITS

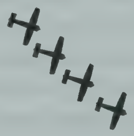
Data supplied by this study's survey efforts indicate that the Sussex Airport is used by both recreational flyers and business aircraft. Information from the business, visitor, and aircraft owner surveys reveals that agriculture and service industries use the airport for business. The companies flying into the airport are located in various areas throughout the U.S. Some of the more notable companies using the airport for business include Xerox, Ames Rubber, and other small and independent businesses. Businesses indicate that the airport is helpful to them because it allows them to attend meetings at the spur of the moment and provides a more efficient way of transporting goods and personnel.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The Sussex Airport sponsors an airshow that is responsible for attracting tens of thousands of people to the area. The event is a main contributor to the growth of the airport; the estimated 100,000 attendees that come to the air show each year bring thousands of dollars into the local economy. In addition to the airshow, the airport offers flight instruction, a location for the Civil Air Patrol to train, and home base for almost 150 aircraft. The airport also supports an aerial advertising/banner towing operation. The airport hosts tours for local elementary school children and FAA safety seminars.

SUMMARY

On an annual basis, Sussex Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
61	**$1.4 million**	**$3.3 million**

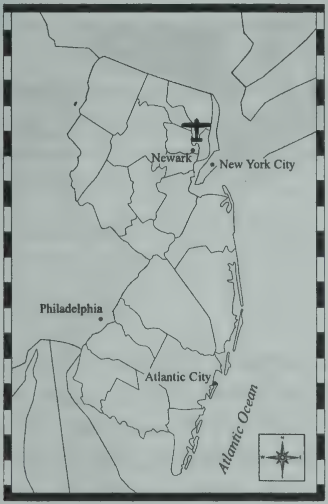


AIRPORT LOCATION

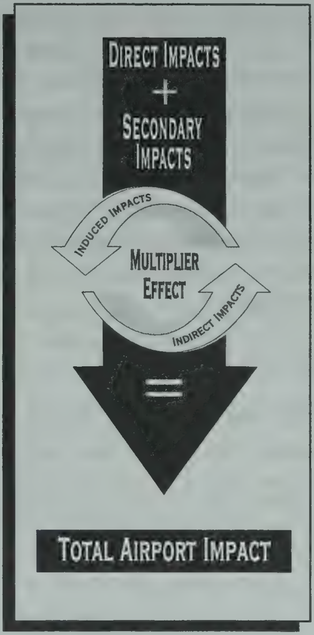
Teterboro Airport is located in northeast New Jersey in the Town of Teterboro. The airport is situated in Bergen County and lies just eight miles west of New York City. Teterboro Airport, a designated reliever airport, is publicly owned by the Port Authority of New York and New Jersey and is operated by Johnson Controls World Services. Teterboro Airport is located less than one mile from Interstate Highway 80 and State Route 46, less than three miles from the Garden State Parkway, and five miles from the New Jersey Turnpike. Both the Newark and New York City central business districts are less than 15 minutes away by car. The airport is designated as a Tax-Free Zone.

With the aid of a continuously staffed FAA air traffic control tower, the airport logs over 158,100 operations a year. Customs services are available at the airport and operate during standard business hours (8:00 am-4:00 pm) and by appointment during non-standard business hours. Flight instruction and aircraft rental are also offered by the flight schools at the airport. Teterboro Airport encompasses approximately 830 acres of land and has two runways. The airport is home to over 129 single-engine, 12 multi-engine, 89 jet engine aircraft, and 15 helicopters, for a total of 245 based aircraft. Runway 1/19 is 7,000 feet in length and 150 feet in width, while Runway 6/24 is 6,013 feet in length and 150 feet in width. Runway 6/24 has a precision approach (ILS RWY 6) and four nonprecision approaches (VOR RWY 24, VOR/DME 1 RWY 24, VOR/DME RNAV RWY 24 and NDB RWY 6).

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



In addition, the airport is served by two nonprecision circling approaches (VOR/DME A, VOR/DME B). Both runways have high intensity runway lighting (HIRL) and visual approach slope indicators (VASIs). Runway 6 has approach lighting. Airside capabilities of the airport include the handling of corporate aircraft, FAA Air Traffic Control services, customs and immigration services, and 24-hour security/fire protection.

Direct Impacts

In 1994, there were 82 aviation related tenants on the airport who supported approximately 1,368 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation related tenants is estimated at $176.2 million annually. The estimated direct annual payroll of these tenants is $53.6 million. Survey data indicated that approximately 299,100 visitors used the airport in 1994. Approximately 90 percent of these visitors used the airport for business travel, while 10 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $76.7 million. This visitor related output (spending) supported an additional 2,045 full-time jobs for employees earning $48.5 million annually.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	1,367.5	1,300.6	2,668.1
GA VISITORS	2,045.4	1,197.6	3,243.0
TOTAL	3,412.9	2,498.2	5,911.1

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$53,578,800	$37,073,600	$90,652,400
GA VISITORS	$48,476,000	$34,825,600	$83,301,600
TOTAL	$102,054,800	$71,899,200	$173,954,000

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$176,156,300	$124,997,800	$301,154,100
GA VISITORS	$76,718,300	$81,807,800	$158,526,100
TOTAL	$252,874,600	$206,805,600	$459,680,200

Secondary Impacts

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Teterboro Airport was approximately $459.7 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 5,911 persons, with a total annual payroll (direct and secondary) of approximately $174.0 million associated with these jobs.

OTHER BENEFITS

The Teterboro Airport is primarily used by the business sector as an alternate to Newark, JFK, and LaGuardia International airports. Information from the business, visitor, and aircraft owners surveys shows that top business users of the airport fall into the following classifications: financial, manufacturing, transportation, and professional services. Companies visiting Teterboro Airport travel from all over the world. Typical companies arriving via the Teterboro Airport include the Triton Energy, Anheuser Bush, and Raytheon Aircraft Corporation. Businesses flying into the airport are doing business with financial institutions and corporations headquartered in New York City.

The Teterboro Airport plays a large role in the day-to-day operation of non-aviation-related businesses. Companies that responded to the business survey indicate that a location near a major corporate airport is essential to their business dealings. In addition, charter companies located at the airport have indicated that their business depends upon their ability to transport high level executives who are unable to use scheduled airline service.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. Activities that are present at the airport include recreational flying, flight instruction, and an air museum. The airport has numerous organ transplant flights and is the northeast hub for the Federal Reserve. In addition, the airport sponsors local youth activities, and it hosts EMS training seminars, blood drives, and various other community activities. The airport is the location for the FAA Flight Standards District Office. The airport has opened its doors for events that benefit all the citizens such as tours for Girl Scouts and Boy Scouts of America, the work program for the Bergen County jail, a Christmas food drive, the Confederate Air Force Exhibit, and the D-Day Commemorative Ball. The airport is the selected site for the New Jersey Aviation Hall of Fame and Museum, a non-profit museum that is dedicated to the preservation of New Jersey's distinguished aviation and space heritage.

Teterboro Airport has good potential for growth due to its proximity to the Manhattan business district and to many corporate headquarters in northern New Jersey. For the airport to continue to adequately serve the needs of its market area, additional corporate hangar facilities need to be developed. The airport recognizes that today's corporate airport must maintain community compatibility. The Teterboro Airport has a Noise Abatement Program which has been recognized as one of the nation's most innovative and effective efforts to deal with airport noise. The airport has been the recipient of distinguished awards from the American Institute of Aeronautics and Astronautics and the American Association of Airport Executives.

Summary

On an annual basis, Teterboro Airport's tenants and visitors provide the following total benefits:

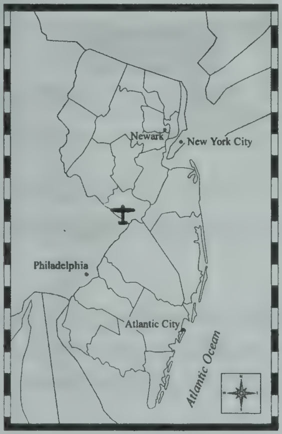
Jobs	Payroll	Output/Spending
5,911	$174 million	$459.7 million

AIRPORT LOCATION

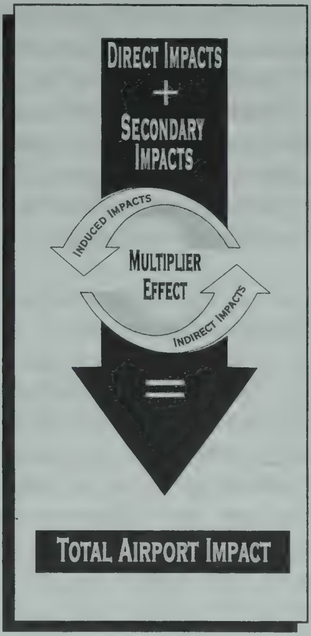
Trenton Mercer Airport is located five miles northwest of the City of Trenton, New Jersey, in Ewing Township. The airport is located midway between New York and Philadelphia in the center of New Jersey. The airport's location is unique geographically, overlapping three major markets: suburban Manhattan-New England, Delaware Valley, and the Boston-Washington Corridor. Approximately one-tenth of the U.S. population is located within a 75-mile radius of the airport. The airport is easily accessed by Interstate Highway 95.

Trenton Mercer Airport is a premiere publicly-owned, public-use facility operated by Mercer County. The airport is part of the county's International Trade Center which comprises over 1,000 acres surrounding the airport. The International Trade Center supports research and development, manufacturing, warehousing, light industry, and offices. The county's Foreign Trade Zone enhances economic development opportunities in Mercer County.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Commercial airline service began at Trenton Mercer Airport during the summer of 1995. The airfield, with 175 based aircraft, experiences 146,000 annual operations. The airport supports a large contingent of helicopters, and over 18 military aircraft are based at the airport. The primary runway, Runway 6/24, is 6,006 feet long and is equipped with a precision approach (ILS RWY 6) and two nonprecision approaches (NDB RWY 6, VOR RWY 24). The runway is outfitted with high intensity runway lighting (HIRL), visual approach slope indicators (VASIs), and an approach lighting system (MALSR). Runway 16/34 is 4,800 feet long and is equipped with two nonprecision approaches (VOR/DME RWY 16, VOR/DME RWY 34). In addition to airside capabilities for handling the majority of the corporate and air carrier aircraft fleet, the facility provides FAA Air Traffic Control services and 24-hour security/fire protection.

DIRECT IMPACTS

In 1994, there were 26 aviation-related tenants on the airport who supported over 701 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $107.1 million annually. The estimated direct annual payroll of these tenants is $28.2 million. Survey data indicated that approximately 68,600 vistors used the airport in 1994. Approximately 80 percent of these visitors used the airport for business travel, while 20 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $17.1 million. This visitor related output (spending) supported an additional 457 full-time jobs for employees earning $10.8 million annually.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	701.5	593.4	1,294.9
GA VISITORS	456.7	267.4	724.1
TOTAL	1,158.2	860.8	2,019.0

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$28,158,200	$19,757,900	$47,916,100
GA VISITORS	$10,823,800	$7,775,900	$18,599,700
TOTAL	$38,982,000	$27,533,800	$66,515,800

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$107,132,900	$75,388,400	$182,521,300
GA VISITORS	$17,130,000	$18,266,400	$35,396,400
TOTAL	$124,262,900	$93,654,800	$217,917,700

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Trenton Mercer Airport was approximately $217.9 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 2,019 persons, with a total annual payroll (direct and secondary) of approximately $66.5 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate businesses routinely use Trenton Mercer Airport as an alternative to Philadelphia International Airport. Information from the business, visitor, and aircraft owner surveys reveals that the top business users of the airport are the service and manufacturing industries. Businesses that fly into Trenton Mercer Airport are typically located in Ohio, Pennsylvania, and North Carolina. Local users of the airport include Amarada-Hess Corporation, Johnson and Johnson, Pfizer, Unisys, and Bristol Meyers-Squibb. Transient business users of the airport include United Beechcraft Corporation, Shamrock Technologies, and FMC Corporation. Companies indicate that the airport is beneficial to businesses because it affords increased flexibility and easy access to out-of-state properties.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. Trenton Mercer Airport has served as a site for emergency medical evacuation operations, a base for the Air National Guard, a base for New Jersey State Police, and a base for the U.S. Naval Warfare Center. Through its partnership with Mercer County Community College, the airport also accommodates a significant level of student training.

Newly upgraded terminal facilities, the establishment of a Foreign Trade Zone, and proximity to Interstate Highway 95 will help the future growth of Trenton Mercer Airport. In addition, the airport has added scheduled commercial air service (East Wind Airlines) that will provide better connections for local businesses to other business markets. The airport also offers an approved site for International Customs which makes it attractive to business users.

In addition to its aviation-related tenants, the airport is also home to two other tenants who provide 18 on-site jobs. These jobs have an estimated annual payroll of $479,200, and these non-aviation tenants spend $1.2 million annually in the local economy. These impacts/benefits are in addition to those noted below for the airport's aviation-related tenants and visitors.

Airport tenants have indicated that growth would be stimulated by the addition of a precision approach and by providing long-term compatible land use in the airport environment.

SUMMARY

On an annual basis, Trenton Mercer Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
2,019	**$66.5 million**	**$217.9 million**

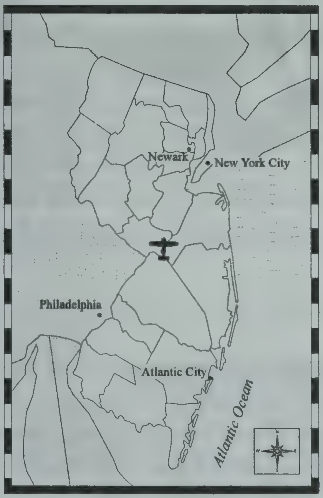
AIRPORT LOCATION

Trenton-Robbinsville Airport is a privately-owned airfield located seven miles east of Trenton, New Jersey, in Washington Township. Washington Township lies within Mercer County. Highway access to the airport is excellent, with easy on and off ramps from Exit 5 on Interstate Highway 195. Mercer County is located midway between New York and Philadelphia. The airport's location is unique geographically, overlapping three major markets: suburban Manhattan-New England, the Delaware Valley, and the Boston-Washington Corridor. Approximately one-tenth of the U.S. population is located within a 75-mile radius of the airport.

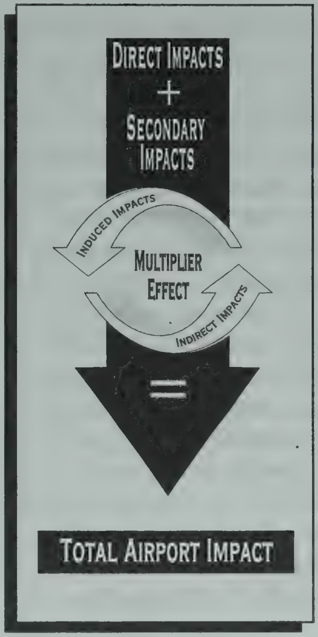
The airport has 23,000 annual operations, many of which are flight-instruction related, and 50 based aircraft. Trenton-Robbinsville Airport's single runway is 4,275 feet long and 80 feet wide. A full length parallel taxiway serves the runway. Runway 11/29 is equipped with low intensity runway lighting (LIRL), visual approach slope indicator (VASI), and a straight-in nonprecision approach for Runway 29 (VOR RWY 29).

The airport is a designated reliever airport. Its proximity to an adjacent golf course, restaurant, and Great Adventure make the airport a valuable transportation asset for visitors and nearby businesses.

LOCATION MAP



IDENTIFYING ECONOMIC IMPACTS



Direct Impacts

In 1994, there were five aviation-related tenants on the airport who supported over 13 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $1.5 million annually. The estimated direct annual payroll of these tenants is $345,700. Survey data indicated that approximately 4,500 visitors used the airport in 1994. Approximately 40 percent of these visitors used the airport for business travel, while 60 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $884,300. This visitor related output (spending) supported an additional 24 full-time jobs for employees earning $559,300 annually.

Secondary Impacts

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	12.5	12.3	24.8
GA VISITORS	23.6	13.8	37.4
TOTAL	36.1	26.1	62.2

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$345,700	$237,700	$583,400
GA VISITORS	$559,300	$401,800	$961,100
TOTAL	$905,000	$639,500	$1,544,500

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$1,531,100	$1,090,100	$2,621,200
GA VISITORS	$884,300	$943,000	$1,827,300
TOTAL	$2,415,400	$2,033,100	$4,448,500

Total Impacts

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Trenton-Robbinsville Airport was approximately $4.4 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 62 persons, with a total annual payroll (direct and secondary) of approximately $1.5 million associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate the Trenton-Robbinsonville Airport is routinely used as an alternative to Mercer County Airport. Information from the business, visitor, and aircraft owner surveys reveals that the top business users of the airport fall into the following classifications: manufacturing, transportation, and retail. Businesses that fly into Trenton-Robbinsonville Airport are most often located in Virginia, Pennsylvania, and Ohio. Companies flying into New Jersey via Trenton-Robbinsonville Airport to conduct business include J.W. Harry, Inc.; Aircaft Owners and Pilots Association; and Wal-Mart. Businesses flying into the airport are conducting business with organizations such as Bordentown Auto Auction and the New Jersey Department of Transportation. Companies surveyed indicate that the Trenton-Robbinsonville Airport makes travel to their branch stores easier, reduces time during business trips, and gives them the ability to more efficiently transport clients.

Airports in New Jersey mean more than just business, dollars, and jobs to the State; airports contribute in many ways to the overall quality of life in the community they serve. The types of activities that occur at Trenton-Robbinsonville Airport on a regular basis are emergency medical services for patient transport, flight training, and recreational flying. The airport hosts a number of aviation-related recreational activities including ultralights, gliders, and hot air balloons. Some of the other beneficial uses of aircraft based at the airport include helicopter operations providing various flight services for scenic tours; real estate inspection; aerial photography; construction job surveys; surveillance of power lines, pipelines, fiber-optics; and news and traffic reporting. Trenton-Robbinsville Airport is also home to the famous Pitcairn PCA-2 autogyro.

Trenton-Robbinsonville Airport shows good growth potential. Development and growth will continue to spread eastward from downtown Trenton towards Robbinsonville. New businesses and industrial parks are being developed in the nearby Interstate Highway 195 corridor. As the area grows, the airport will benefit from the additional businesses needing the services of a general aviation airport.

SUMMARY

On an annual basis, Trenton-Robbinsville Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
62	$1.5 million	$4.4 million

Airport Location

Trinca Airport is situated in the upper northwest corner of New Jersey. The airport is located in Green Township, in Sussex County. The airport lies 56 miles west of New York City.

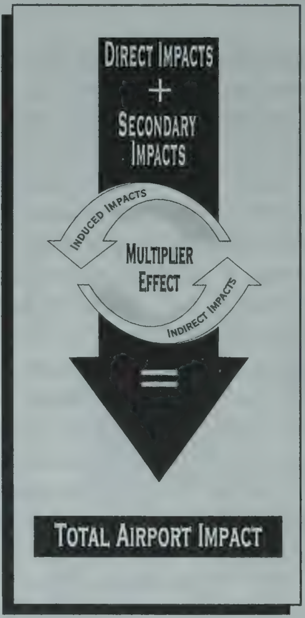
Built in 1939, Trinca Airport is a privately-owned and operated, public-use general aviation airport. The airport is operated by Tranquility Aero Corporation. The 12-acre airport is well-maintained in a rural setting. This setting, together with the low traffic volume in the area, makes the airport an ideal training site for novice pilots and the weekend flyer. The turf landing strip is particularly ideal for antique/classic conventional gear aircraft that still operate with a tail wheel.

Trinca Airport has more than 25 based aircraft with over 7,000 annual operations occurring at the airport. Trinca Airport's facilities consist of a single turf runway, designated 6/24, which is 1,924 feet long and 135 feet wide. There is hangar space for 15 aircraft and tie-down spaces for 13 aircraft. Terminal space consists of an office area, a small lounge, restrooms, and a flight planning area. The airport offers fuel, flight instruction, and maintenance. The runway has no taxiway, but is equipped with low intensity runway lighting (LIRL).

The airport plans to pave and lengthen its runway. The maximum proposed buildout of the runway would involve an expansion to a length of 4,300 feet and a width of 75 feet, with the capability to support aircraft up to 12,500 pounds in weight. In addition, hangar space of 44,900 square feet and tie-down space of 15,300 square yards is planned.

Location Map

Identifying Economic Impacts

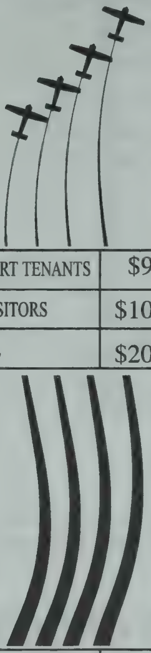


DIRECT IMPACTS

In 1994, there were two aviation-related tenants on the airport who supported approximately four sub-contracted employees. These tenants' direct or first round sub-contractor employment, sub- contractor payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $241,800 annually. The estimated direct annual sub-contractor payroll of these tenants is $94,900. Survey data indicated that approximately 1,100 visitors used the airport in 1994. Approximately 10 percent of these visitors used the airport for business travel, while 90 percent used the airport for personal use. Direct output from general aviation visitors is estimated at an annual $167,300. This visitor related output (spending) supported 5 additional full-time jobs for employees earning $106,700 annually.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	3.5	3.4	6.9
GA VISITORS	4.5	2.7	7.2
TOTAL	8	6.1	14.1



PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$94,900	$65,200	$160,100
GA VISITORS	$106,700	$76,600	$183,300
TOTAL	$201,600	$141,800	$343,400

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$241,800	$172,200	$414,000
GA VISITORS	$167,300	$178,400	$345,700
TOTAL	$409,100	$350,600	$759,700

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated using the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Trinca Airport was approximately $759,700. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 14 persons, with a total total payroll (direct and secondary) of approximately $343,400 associated with these jobs.

OTHER BENEFITS

The Trinca Airport is primarily used by recreational pilots. The airport has tentative plans to pave and lengthen its runway. With a large amount of competitively priced land, close proximity to a freight rail system, full utilities, excellent access to the State's major interstate highway system, and the newly planned all-weather Trinca Airport, the potential for a multi-modal transportation hub is good. If this scenario becomes a reality, Trinca Airport has the potential to greatly enhance the economic base of the area.

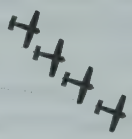
The airport supports flight instructors, recreational and weekend flying, and fire and police protection. Some of the other beneficial uses of the airport include the storage of antique/classic aircraft; this activity contributes to the preservation of our nation's aviation history.

Trinca Airport recognizes that today's airport must be a safe, multi-purpose facility that maintains community compatibility. Guidelines for orderly development of the airport are outlined in the Trinca Airport master plan. The airport is uniquely situated in a multi-modal location with two proposed rail lines on-site and Interstate Highway 80 nearby. Trinca Airport is a 12-minute drive from Hackettstown, Newton, and the International Trade Zone. The airport is in close proximity to all important market centers in northern New Jersey. The airport will play a key role in the economic future of the region.

SUMMARY

On an annual basis, Trinca Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
14	$343,400	$759,700

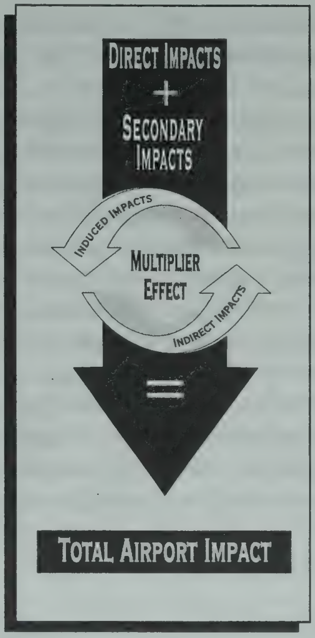


AIRPORT LOCATION

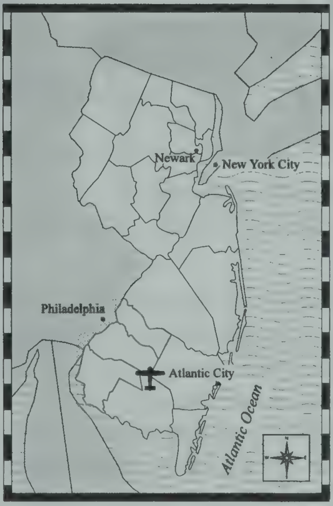
Vineland-Downstown Airport is located in southeastern Gloucester County near the border of Cumberland and Atlantic counties. Although the airport is located in Gloucester County, the local economy is based in nearby Vineland, which is in Cumberland County. Vineland-Downstown Airport is an agricultural aerial application (ag spraying) center for the region. Vineland-Downstown Airport is a 45-acre privately-owned, public-use facility. The airport has been a base for agricultural applications since 1945.

Vineland-Downstown Airport is comprised of two turf runways. The primary runway, Runway 2/20, is 2,230 feet long and 100 feet wide. This runway has a visual approach at both ends. In addition, the Cedar Lake VOR (very high frequency omnirange radio beacon) is located on the field. The airport operates non-standard lighting on the primary runway and has 100LL fuel. There are approximately 20 aircraft based at the airport, and it hosts approximately 10,500 annual operations.

IDENTIFYING ECONOMIC IMPACTS



LOCATION MAP



DIRECT IMPACTS

In 1994, there was one aviation-related tenant, Downstown Aero Crop Service, located on the airport. Survey data revealed little visitor activity at the airport. Most operations at the airport are directly involved in aerial application of agricultural and conservation chemicals. Occasionally the poultry industry may have business-related operations at the airport, but those activities do not have a significant impact on the economy. In order to preserve tenant confidentiality, total tenant and visitor impacts have been omitted. Total direct full-time employment related to airport tenants and general aviation visitors is estimated at 14 persons. Direct payroll is estimated at more than $532,100 and direct output is estimated at $1,124,800.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors. In order to preserve confidentiality, however, tenant and visitor information have been combined.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	14.3	13.9	28.2

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$532,100	$366,100	$898,200

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	---	---	---
GA VISITORS	---	---	---
TOTAL	$1,124,800	$805,400	$1,930,200

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Vineland-Downstown Airport was approximately $1.9 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 28 persons, with a total annual payroll (direct and secondary) of approximately $898,200 associated with these jobs.

OTHER BENEFITS

Data supplied by this study's survey efforts indicate that one particular business is the primary user of the Vineland-Downstown Airport. This company, the Downstown Aero Crop Service, is responsible for spraying a large number of the agricultural fields in the region. The airport is located in a sparsely populated area; there is a very limited draw for recreational or business type aircraft. The airport serves its niche and is not expected to increase in size.

Vineland-Downstown Airport plays a significant role as an air base for aerial applicators and in fire suppression for the New Jersey Forest Fire Service. The landing strip is grass and is ideal for the operation of the eleven Grumman AG-CATs and two converted Piper Aztecs based at the airport.

Aerial applications that take place from the airport include service to the State of New Jersey to control the gypsy moth and mosquitoes. Aircraft are also used for fire suppression and are dispatched to more than 100 fires annually throughout the forests, parks, and Pine Barrens of New Jersey and New York. Aircraft based at this airport also serve the State of Maryland. The airport plays a major role in contributing to the overall quality of life of the State's residents and to the preservation of New Jersey's green spaces and agricultural industry.

SUMMARY

On an annual basis, Vineland-Downstown Airport's tenants and visitors provide the following total benefits:

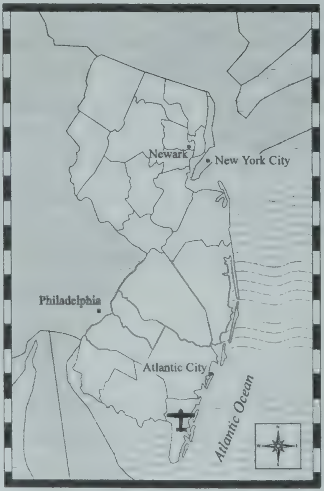
JOBS	PAYROLL	OUTPUT/SPENDING
28	**$898,200**	**$1.9 million**

Airport Location

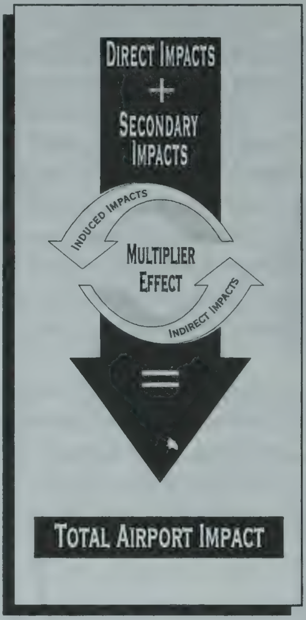
Woodbine Municipal Airport is located six miles west of the Jersey Shore, near Sea Isle City. The airport is approximately 35 miles southwest of Atlantic City. Philadelphia is located 82 miles west and New York City is 160 miles north of the airport. The airport is situated less than five miles from Exit 17 on the Garden State Parkway in Dennis Township in Cape May County. An active Conrail line is adjacent to the airport property. Woodbine Municipal Airport is a vital link for the city's tourist industry. The airport is base for 40 aircraft and approximately 18,000 annual operations occur at the airport. Most of the operations at the airfield take place during the busy tourist season.

Woodbine Municipal Airport is a publicly-owned, public-use general aviation airport located on a 700-acre tract. The well-maintained airport is situated in a rural setting, which makes the airport an ideal training site for novice pilots and the weekend flyer. The airport's proximity to tourist attractions and activities such as the Atlantic Ocean beaches, the boardwalk, and Atlantic City casinos make the airport a valuable transportation asset for nearby businesses.

Location Map



Identifying Economic Impacts



The airport is used by tourists flying into nearby Sea Isle City and other points in Cape May County. Woodbine Municipal Airport has two runways. The primary runway, Runway 1/19, is 3,300 feet long and 150 feet wide. This runway has a partial length taxiway and a visual approach at both ends of the runway. Runway 12/30 is 3,100 feet long and 75 feet wide; this runway has a full length parallel taxiway and a visual approach on both ends of the runway. A nonprecision circling VOR-A approach is available to the airport. Medium intensity runway lighting (MIRL) and 100LL fuel are also available at the airport.

DIRECT IMPACTS

In 1994, there were three aviation-related tenants on the airport who supported approximately four employees. These tenants' direct or first round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at $349,600 annually. The estimated direct annual payroll of these tenants is $88,000. Survey data indicated that approximately 3,200 visitors used the airport in 1994. Approximately 10 percent of these visitors used the airport for business travel, while 90 percent used the airport for personal use. This visitor related output (spending) supported an additional 13 full-time jobs for employees earning $301,000 annually. Direct output from general aviation visitors is estimated at an annual $825,100.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced and indirect impacts calculated with the IMPLAN multipliers. The accompanying table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	3.5	3.4	6.9
GA VISITORS	12.7	7.4	20.1
TOTAL	16.2	10.8	27.0

PAYROLL

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$88,000	$60,500	$148,500
GA VISITORS	$301,000	$216,200	$517,200
TOTAL	$389,000	$276,700	$665,700

OUTPUT

	DIRECT +	SECONDARY =	TOTAL
AIRPORT TENANTS	$349,600	$248,900	$598,500
GA VISITORS	$475,500	$507,000	$982,500
TOTAL	$825,100	$755,900	$1,581,000

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at Woodbine Municipal Airport was approximately $1.6 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 27 persons, with a total annual payroll (direct and secondary) of approximately $665,700 associated with these jobs.

OTHER BENEFITS

Information from the business, visitor, and aircraft owner surveys indicates that although the Woodbine Municipal Airport is mainly used by the recreational aviator, it is also occasionally used by business aircraft. Information from the business surveys shows that professional, government, and financial companies are top business users of the airport. Data from the visitor survey indicate that Woodbine Municipal Airport is used as an alternative to Atlantic City International Airport. Businesses that fly into Woodbine Municipal Airport are most often located in the northeastern portion of the United States. Clinique Wool Products and other small and independent businesses are typical users of Woodbine Municipal Airport. Data from the business survey indicate that the airport allows for better communications with clients and reduces travel time and costs.

The airport's main strength lies with the recreational pilot. The airport has 40 based aircraft and offers flight instruction. In addition to helping the recreational pilot, the airport also offers benefits to its community. Emergency medical, forest firefighting, banner towing, and agricultural spraying all take place at the Woodbine Airport. Due to plenty of developable land and increasing tourism, Woodbine Municipal shows good growth potential.

Some other beneficial uses of the airport include storage of antique/classic aircraft which contribute to the preservation of our nation's aviation history. Woodbine Municipal Airport encourages community involvement in planning and is an active member of the Woodbine Borough. The airport hosts a very successful "Festival of Friends," a yearly open house which includes community involvement and attracts visitors from around the area.

For the airport to continue to adequately serve the needs of its market area, however, environmental constraints need to be addressed. In addition, the airport needs additional aircraft storage space to meet future demand.

In addition to the tenant and visitor benefits shown below, the airport also supports one non-aviation tenant who has six employees who earn $154,900 annually. This tenant is responsible for $454,900 in additional output.

SUMMARY

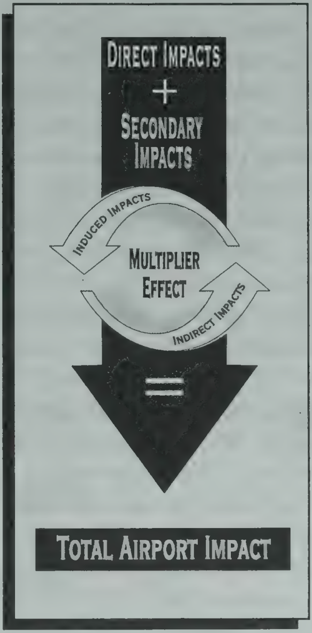
On an annual basis, Woodbine Municipal Airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
27	$665,700	$1.6 million

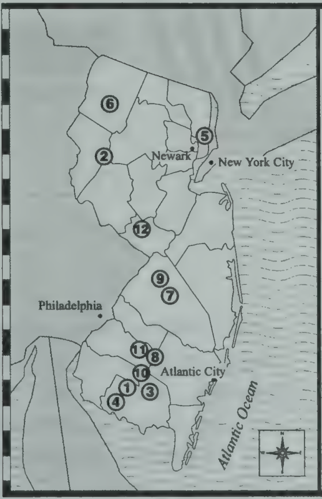
Airport Locations

There are 12 other airports (secondary airports) in New Jersey which benefit the economy of the State. Most of these airports have turf runways, and the majority are located in the southern, rural portions of the State. Collectively, 90 aircraft are based at these airports; almost all of these are single engine aircraft. Aircraft owners base their airplanes at these airports for a variety of reasons such as available aircraft storage, less expensive storage fees, and aircraft tire conservation. Airports with turf runways usually experience lower maintenance costs, and they often pass the savings on to the based aircraft owner. In addition to the turf runway airports, Little Ferry Seaplane Base, the only remaining seaplane base in the State, is included in this category. This seaplane base is located in northern New Jersey on the Hackensack River. In total, the other airports support an estimated 20,000 gerneral aviation operations annually.

Identifying Economic Impacts



Location Map



OTHER AIRPORTS

① Bucks Airport
② Hacketstown
③ Kroelinger Airport
④ Li Calzi Airport
⑤ Little Ferry Seaplane Base
⑥ Newton Airport
⑦ Pemberton Airport
⑧ Piney Hollow Airport
⑨ Red Wing Airport
⑩ Rudy's Airport
⑪ Southern Cross Airport
⑫ Twin Pines Airport

DIRECT IMPACTS

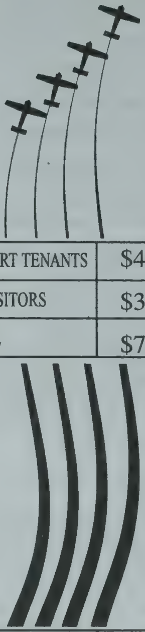
In 1994, there were 17 aviation-related tenants located at the other turf airports in the State who supported 19 employees. These tenants' direct or first round employment, payroll, and output impacts were derived from New Jersey Division of Aeronautics data. Direct output from all on-airport aviation-related tenants is estimated at $1.6 million annually. The estimated direct payroll of these tenants is $460,700. New Jersey Divisionof Aeronautics data indicated that approximately 3,500 visitors used theother airports in 1994. Approximately 10 percent of these visitors used the airports for business travel, while 90 percent used the airports for personal use. This visitor-related output (spending) supported an additional 14 full-time jobs for employees earning $324,700 annually. Direct output from general aviation visitors is estimated at $513,800.

SECONDARY IMPACTS

The direct impacts associated with on-airport tenants and general aviation visitors also create secondary impacts throughout the State. Secondary impacts include induced impacts and indirect impacts developed with the IMPLAN multipliers. The table presents the 1994 direct, secondary, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

EMPLOYMENT

	DIRECT+	SECONDARY=	TOTAL
AIRPORT TENANTS	19.0	18.7	37.7
GA VISITORS	13.7	8.0	21.7
TOTAL	32.7	26.7	59.4



PAYROLL

	DIRECT+	SECONDARY=	TOTAL
AIRPORT TENANTS	$460,700	$316,800	$777,500
GA VISITORS	$324,700	$233,300	$558,000
TOTAL	$785,400	$550,100	$1,335,500

OUTPUT

	DIRECT+	SECONDARY=	TOTAL
AIRPORT TENANTS	$1,557,200	$1,108,600	$2,665,800
GA VISITORS	$513,800	$547,900	$1,061,700
TOTAL	$2,071,000	$1,656,500	$3,727,500

TOTAL IMPACTS

For 1994, the total output (including direct and secondary impacts) stemming from all on-airport tenants and general aviation visitors at other airports in the State are approximately $3.7 million. Total full-time employment related to airport tenants and general aviation visitors, including all secondary impacts, is estimated at 59 persons, with a total annual payroll (direct and secondary) of approximately $1.3 million associated with these jobs.

OTHER BENEFITS

While the system of secondary airports provide a variety of services, their primary function is to accommodate recreational and personal use activity, along with the activties of the sport aviator. Secondary airports provide a low cost alternative for pilots and aircraft owners who do not require extensive, full-service facilities. These other airports accommodate pilot training and other aviation-related businesses.

SUMMARY

On an annual basis, these secondary airport's tenants and visitors provide the following total benefits:

JOBS	PAYROLL	OUTPUT/SPENDING
59	**$1.3 million**	**$3.7 million**

Appendix A
Surveys

State of

New Jersey

AIRCRAFT OWNERS SURVEY

Dear Aircraft Owner:

Employers throughout New Jersey rely daily on general aviation services to conduct their business. This linkage and the day-to-day operation of New Jersey's airport system provides a positive economic benefit. A study is being undertaken to measure the economic benefit that New Jersey derives annually from its airport system. This survey is part of that study. General aviation, for this analysis, is defined as all aviation activity except scheduled passenger and cargo carriers. For this study, general aviation includes all business jets, twin and single engine aircraft, and helicopters. Please take a few minutes to complete and return your survey. **All individual responses will be held strictly confidential.**

1. Do you base your aircraft at a New Jersey airport? Yes No

If yes, at which airport do you base your aircraft?

________________ Airport ____________ City ______ State

2. What type of aircraft do you own? ____________________ (i.e., business jet - Lear 35)
(If you own more than one aircraft, please attach a list of all your aircraft.)

3. Of the operations that you conduct annually with all aircraft, please estimate the percentage of your operations by category.

______% Personal/Pleasure ______% Training ______% Business ____________ Other (please describe) ______%

IF YOU FLY YOUR AIRCRAFT FOR BUSINESS, PLEASE COMPLETE QUESTIONS 4 THROUGH 13.
IF YOU DO NOT OPERATE YOUR AIRCRAFT FOR BUSINESS, PLEASE RETURN YOUR SURVEY NOW.

4. What category best describes your business?

☐ Agriculture, Forestry, Fishing
☐ Construction
☐ Manufacturing
☐ Retail Trade
☐ Financial/Insurance/Real Estate
☐ Mining
☐ Transportation/Utilities
☐ Wholesale Trade
☐ Services
☐ Government
☐ Other ________________ (please describe)

What type of service or product does your business provide? ________________

5. Approximately how many employees does your business have in New Jersey? ____________

What is the estimated annual payroll of your business in New Jersey? $____________

What are the approximate annual sales of your business in New Jersey? $____________

6. What percent of your company's annual business activity is tied to the availability of your company's aircraft, your company's ability to use general aviation, and/or increased productivity made possible because your customers and suppliers can reach you more efficiently? ________%

7. If your business owns a general aviation aircraft, please provide the following:

Business Address: Street ____________ City ____________ State ______ Zip ______

Name of Business ____________

8. How far is your business from the airport where your plane is based? ____________ (minutes)

9. How many business operations (trips) do you make annually with your aircraft? ________ (estimated)

10. Using the total in Question 9, what percentage of these operations is conducted at airports in New Jersey versus airports outside the State?

Estimated Annual Trips to New Jersey Airports ____________ Estimated Annual Trips to Out-of-State Airports ____________

11. What other New Jersey airports (aside from where you base your plane) do you use for business flying on a regular basis?

Airport Name	**Annual Trips**

12. How important is general aviation to your day-to-day business operation? (please circle one)

Essential   Very Important   Important   Helpful, But Not Really Important   Not Essential

13. Please describe how use of general aviation benefits the day-to-day operation of your business in New Jersey. Please provide specific examples, if possible, and name the New Jersey airport associated with these additional benefits.

____

____

____

PLEASE FOLD, STAPLE, AND RETURN YOUR COMPLETED SURVEY BY APRIL 7, 1995 .

THANK YOU FOR YOUR COOPERATION!

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BUSINESS REPLY MAIL

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The Airport Technology and Planning Group, Inc.
One Lytle Place, Suite 226
621 Mehring Way
Cincinnati, OH 45273-8974

State of

New Jersey

BUSINESS USE OF AVIATION SURVEY

Dear Business Aviation User:

Employers throughout New Jersey rely daily on scheduled commercial airline and general aviation services to conduct their business. This linkage provides a positive economic benefit. A study is being undertaken to measure the economic benefit that New Jersey derives annually from its airport system. This survey is part of that study. For this analysis, general aviation is defined as all aviation activity except scheduled passenger and cargo carriers. For this study, general aviation includes all business jets, twin and single engine aircraft, and helicopters. Please take a few minutes to complete and return your surveys. **All individual responses will be held strictly confidential.**

1. What is the location of your company in New Jersey? ______________________ Company Name

______________________ Street Address City County ZIP

2. Please check the general category which best describes the nature of your business and give a brief description of the product or service provided: Major product or service provided ______________________

☐ Agriculture, Forestry, Fishing
☐ Construction
☐ Manufacturing
☐ Retail Trade
☐ Financial/Insurance/Real Estate
☐ Mining
☐ Transportation/Utilities
☐ Wholesale Trade
☐ Services
☐ Government
☐ Other ______________ (please describe)

3. Do your employees utilize scheduled commercial airline service in conducting business? (please circle one) **Yes** **No**

If **yes**, please estimate the number of total trips per year by **all employees** from:

Airport	**Annual Trips**
Newark International	______________
JFK or La Guardia	______________
Philadelphia International	______________
Lehigh Valley International (Allentown)	______________
Atlantic City	______________
Other (please list) ______________	______________

4. Does your company:

	Yes	**No**
a. Own general aviation aircraft?	☐	☐
b. Use charter or air taxi on a regular basis?	☐	☐
c. Lease a general aviation aircraft?	☐	☐
d. Have customers or suppliers who travel by general aviation aircraft to visit you?	☐	☐
e. Make use of a general aviation aircraft owned by a club?	☐	☐
f. Reimburse an employee for business use of their general aviation aircraft?	☐	☐

5. If you use general aviation on a routine basis, which New Jersey airports do you use? (please list all)

New Jersey Airport Name	**Number of Annual Landings**
______________	______________
______________	______________
______________	______________
______________	______________

6. Does your company utilize air cargo/package express services for transmitting business materials? **Yes** **No**

If yes, approximately how much did your company spend in 1994 for these services? $______________

7. Approximately how many full-time (2 part-time employees equal 1 full-time employee) persons do you employ in New Jersey? _________

8. What was the total 1994 payroll of your employees working in New Jersey? $ _______________ (estimated)

9. What were your company's gross sales in New Jersey in 1994? $_________ (estimated)
(If you are a governmental organization, please estimate your gross operating budget.)

10. Please estimate the percentage of your New Jersey business activity that depends on the availability of **scheduled commercial air service**. _______%

11. Please estimate the percentage of your New Jersey business activity that depends on the availability of **general aviation services**.
________%

12. Approximately what percent of your company's employment and sales in New Jersey is related to the availability of **scheduled commercial air service**? Employment ___________% Sales ___________% _____ Not available

13. Approximately what percent of your company's employment and sales in New Jersey is related to your use of the State's **general aviation airports**? Employment ___________% Sales ___________% _____ Not available

14. If your company were considering expansion or relocation, how important would the following factors be to your decision-making process?

	Very Important	**Important**	**Not Important**
Convenient highway access	3	2	1
Available labor supply	3	2	1
Rail transportation facilities	3	2	1
Water transportation facilities	3	2	1
A commercial service airport	3	2	1
A general aviation airport	3	2	1
An urban business district	3	2	1
Raw materials	3	2	1
Natural resources	3	2	1
Academic or cultural centers	3	2	1
Tax incentives	3	2	1
Climate	3	2	1
Proximity of suppliers	3	2	1
Historic location of business	3	2	1
Other	3	2	1

(please describe) ______________________

15. Please provide any additional comments concerning how airports in New Jersey benefit your business; provide specific examples and the name of the particular airport, if possible.

PLEASE FOLD, STAPLE, AND RETURN YOUR COMPLETED SURVEY BY APRIL 7, 1995

THANK YOU FOR YOUR COOPERATION!

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One Lytle Place, Suite 226
621 Mehring Way
Cincinnati, OH 45273-8974

State of
New Jersey

GENERAL AVIATION VISITORS SURVEY

Dear General Aviation Visitor:

Employers throughout New Jersey rely daily on general aviation services to conduct their business. This linkage and the day-to-day operation of New Jersey's airport system provides a positive economic benefit. A study is being undertaken to measure the economic benefit that New Jersey derives annually from its airport system. This survey is part of that study. For this analysis, general aviation is defined as all aviation activity except scheduled passenger and cargo carriers. For this study, general aviation includes all business jets, twin and single engine aircraft, and helicopters. Please take a few minutes to complete and return your survey. **All individual responses will be held strictly confidential.**

1. Please provide the name of the airport where you recieved your survey. ______________________________ Airport Name City

2. How many people, including the pilot, were traveling on your plane? __________

3. Is your trip for business or personal travel? **Business** **Personal**

4. If your trip is **business** related, please check the category that describes your business, as well as that of any business you are visiting in New Jersey.

YOUR BUSINESS	BUSINESS YOU ARE VISITING	
☐	☐	Agriculture, Forestry, Fishing
☐	☐	Mining
☐	☐	Construction
☐	☐	Transportation/Communication/Public Utilities
☐	☐	Manufacturing
☐	☐	Professional services
☐	☐	Wholesale Trade
☐	☐	Retail Trade
☐	☐	Business Services
☐	☐	Financial/Insurance/Real Estate
☐	☐	Government

Major product or service provided by your company ______________________________

Major product or service provided by the company you are visiting ______________________________

5. If you are traveling on business, please provide the name of your company and/or the name and location of the company you are visiting in New Jersey.

Your Company:	**Company You Are Visiting:**
Name	Name
Address	Address
City State ZIP	City State ZIP

6. How many days did you or will you stay in New Jersey during this trip? ____________

7. Approximately how much money did you or will you spend during this trip on each of the following items? (please list **only** expenditures made inside New Jersey).

IF TRAVELING AS A FAMILY OR OTHER GROUP, PLEASE SHOW EXPENDITURES MADE BY ALL.

Hotel/Motel	$__________
Food & Beverage	$__________
Rental Car	$__________
Entertainment	$__________
FBO Services (fuel, maintenance, etc.)	$__________
Other ____________________ Please list	$__________
TOTAL	$__________

8. How many persons, including yourself, contributed to the expenditures shown in Question #7? ____________

9. How many times per year do you fly into this New Jersey particular airport? ____________

10. Do you fly into other New Jersey airports on a regular basis? **yes** **no**

If yes, please list the New Jersey airports and your annual trips.

Airport Name	**Annual Trips**
____________________	________
____________________	________
____________________	________
____________________	________

11. Where is your aircraft based? ____
Airport City State

12. Did you fly into this New Jersey airport as an alternative to a more congested commercial service airport? **yes** **no**

13. Please provide information that describes how New Jersey's airports benefit you or your business.
____
____
____
____
____

PLEASE FOLD, STAPLE, AND MAIL YOUR COMPLETED SURVEY AS SOON AS POSSIBLE. RETURN POSTAGE HAS BEEN PREPAID. ***THANK YOU FOR YOUR COOPERATION!***

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One Lytle Place, Suite 226
621 Mehring Way
Cincinnati, OH 45273-8974

State of
New Jersey
AIRPORT TENANT/ MANAGEMENT SURVEY

Dear Airport Tenant:

Employers throughout New Jersey rely daily on general aviation services to conduct their business. This linkage and the day-to-day operation of New Jersey's airport system provides a positive economic benefit. A study is being undertaken to measure the economic benefit that New Jersey derives annually from its airport system. This survey is part of that study. For this analysis, general aviation is defined as all aviation activity except scheduled passenger and cargo carriers. For this study, general aviation includes all business jets, twin and single engine aircraft, and helicopters. Please take a few minutes to complete and return your survey. **All individual responses will be held strictly confidential.**

Please estimate the requested information using data for Calendar Year 1994. Please provide 1993 data for comparative purposes.

I. GENERAL INFORMATION

Airport where your business is located ______________________________

Business Name ______________________________

Contact ______________________________
Name Phone

II. AVIATION ACTIVITY

What area of aviation activity applies to your business at the airport (please check the appropriate category)?

☐ Management
☐ Concession
☐ FBO
☐ Government (FAA)/Airport Management/Airport Proprietor
☐ Air Freight/Cargo Carrier
☐ Other ______________________________
(please specify)

☐ Air Taxi
☐ Charter Operator
☐ Aviation Management
☐ Non-Aviation Business
☐ Flight Instruction
☐ Aircraft Maintenance

III. EMPLOYMENT

How many full-time and part-time employees were employed by your business at the airport?

__________ full-time employees (1994) __________ part-time employees (1994) __________ subcontractors (1994)

__________ full-time employees (1993) __________ part-time employees (1993) __________ subcontractors (1993)

IV. EXPENDITURES

1. Please estimate the total wages paid to all employees shown in Question III.

$__________________ in total payroll (1994)
$__________________ in total payroll (1993)

2. Please estimate how much your company paid in taxes.

$__________________ in State taxes (1994) $__________________ in local taxes (1994)
$__________________ in State taxes (1993) $__________________ in local taxes (1993)

3. Please estimate how much your business spent for major capital improvements at the airport where your business is located.

1994 $________________ 1993 $________________ 1992 $________________

4. **Omitting** the expenditure categories above (i.e., payroll, taxes, and capital improvements), please estimate how much your business spent for **all other** operating expenses.

$__________________ in other operating expenses (1994)
$__________________ in other operating expenses (1993)

V. GROSS SALES (if applicable)

What were your business' total gross sales at the airport where you are located in 1994 and 1993?

$__________________ in total gross sales (1994)
$__________________ in total gross sales (1993)

VI. OTHER DATA

1. Airports can benefit the communities they serve in many subtle ways. As a tenant on the airport, you can help to identify the various ways your airport helps to improve the quality of life by contributing health, welfare, safety, and economic benefits. Please check all activities that take place on the airport where you are located.

- ☐ Recreational flying
- ☐ Reliever for general aviation activity
- ☐ Agricultural spraying
- ☐ Reliever for freight / cargo activity
- ☐ Forest fire fighting
- ☐ Flight training
- ☐ Corporate activity (movement of sales force or executives)
- ☐ Emergency Medical (air ambulance, organ transplant)
- ☐ Business activity
- ☐ Air funeral service
- ☐ Aerial inspections
- ☐ Police / law enforcement
- ☐ Location for community facilities / utilities (i.e., fire department, humane society)
- ☐ Prisoner transport
- ☐ Civil air patrol
- ☐ Shipping of just-in-time/perishable goods
- ☐ Open space / wetland / woodland
- ☐ Career training
- ☐ Education
- ☐ Search & Rescue (Coast Guard)
- ☐ Traffic / News reporting
- ☐ Passive Recreation / Green Belt
- ☐ Pipeline patrol
- ☐ Gateway for VIP / high profile visitors
- ☐ Staging area for community events (i.e., car shows)
- ☐ Environmental patrol
- ☐ Aerial photography / surveying
- ☐ Museums
- ☐ Real estate tours
- ☐ Aerial advertising / Banner towing

In addition, please provide specific examples of benifits your airport provides (i.e., On May 20, EMS used our airport to transport a burn victim to XYZ Hospital).

2. If your activities as an airport tenant involve freight or cargo movement, do you interchange shipments with rail, truck, or port facilities?

☐ yes ☐ no **If yes,** please describe these intermodal interchanges in as much detail as possible including names and location of rail or road carriers used and their distance from the airport where you are a tenant.

3. Please describe any unique conditions or circumstances that you feel may inhibit your airport's ability to grow and expand to meet New Jersey's future aviation needs (i.e., local opposition or the expense of off-airport land).

4. Please list all factors that you feel will contribute to the ability of your business to grow at the airport.

PLEASE RETURN YOUR COMPLETED SURVEY IN THE ENVELOPE PROVIDED BY MAY 30, 1995.

THANK YOU FOR YOUR COOPERATION!

Glossary

GLOSSARY OF TERMS

Air Taxi/Air Charter Operation - An operation by a holder of an Air Taxi Operating Certificate which authorizes the carriage of passengers, mail, or cargo for revenue in accordance with Federal Aviation Regulation (FAR) Part 135.1.

Aircraft Operation - A takeoff or a landing of an aircraft.

Business Use True-Transient Operation - True transient operations are performed by non-locally based aircraft. AOPA estimates that one-third of transient flights are true transient in nature.

Direct Impacts - Economic activity that occurs as a result of an airport. These benefits include all the tenants located on an airport (FBOs, aircraft maintenance, flight schools, government/management, etc.) as well as impacts resulting from visitor expenditures. Direct benefits are also referred to as first round impacts in this study.

Econometric Modeling - The application of statistical methods to the study of economic data. In this study, the IMPLAN econometric model was used to estimate secondary economic impacts.

Economic Impact (economic benefit) - In this analysis there are three measures of economic impact: employment, payroll, and output. These impact categories are exclusive and cannot be summed.

Economic Leakage - Any payroll, sales, and employment generated in the study area that is spent or transferred outside the study area.

Employment Multiplier - The number of jobs created for every job in a particular industry sector. For example, if the air transportation sector has an employment multiplier of 1.98, then one job in the air transportation sector creates an additional 0.98 jobs in the economy.

Fixed Based Operator (FBO) - An on-airport aviation-related business that provides services such as aircraft maintenance, storage, fuel, charter, flight instruction, and avionics installation/repair.

Full-time Equivalent (FEQ) Employment - Two part-time employees or one full-time employee equals one full-time equivalent position.

General Aviation Visitors - Non-local passengers arriving via private or corporate aircraft. For the economic impact analysis, general aviation visitors were assumed to be associated with that portion of the airport's itinerant general aviation activity which is truly transient in nature.

Impact Analysis for Planning (IMPLAN) System - An input-output econometric model developed by the U.S. Forestry Service in cooperation with several other governmental agencies. This model consists of a large economic database that is used to generate input-output tables and estimates the total economic value of an industry. IMPLAN includes data from sources such as Dunn and Bradstreet, the U.S. Department of Commerce, and the U.S. Bureau of the Census.

Indirect Impacts - Benefits that occur as a result of businesses supporting the industry being modeled.

Induced Impacts - All first round airport-related spending, payroll, and employment result in additional spin-off economic benefits. Induced impacts are often referred to as the multiplier effect due to the fact that direct benefits will ripple through or "multiply" within the economy. These successive waves of employment, payroll, and re-spending (induced impacts) continue within the economy until they are lost through leakage.

Input-Output Model - The assessment of change in overall economic activity as the result of some corresponding change in one or several activities. It is a linear model of estimates of all purchases and sales between the various sectors of an economy.

Itinerant Operation - A non-training flight that arrives or departs an airport.

Local Operation - A training (touch-and-go) operation or a departure or arrival that stays within a 20-mile radius of a particular airport.

Median Income - The middle income value of a group when each income value in the group is arranged according to size (lowest to highest or vice versa).

Multiplier Effect - The effect of money being spent and re-spent in the economy.

On-Airport Tenants - Includes fixed base operators (FBOs), flight schools, concessionaires, airport restaurants, and government agencies located on the airport. Government also includes public airport sponsors and the Federal Aviation Administration (FAA).

Output (Spending) - For most tenants output is equated with the sum of annual gross sales and average annual capital expenditures. Government output is equated to the sum of annual payroll, other expenditures, and average annual capital improvement costs. For visitor impacts, output is assumed to equal annual visitor expenditures.

Output Multiplier - The effect of expenditures in one industry sector on the expenditures in the economy. For example, if the air transportation sector has an output multiplier of 1.71, then $100 in direct expenditures (output) creates secondary output impacts equivalent to $71.

Payroll - The annual salary paid to all workers.

Payroll Multiplier - The effect of payroll in one industry sector on payroll in the economy. For example, if the air transportation sector has a payroll multiplier of 1.69, then $100 in direct employee payroll creates secondary payroll impacts equivalent to $69 in the economy.

Personal Use True-Transient Operations - True-transient operations where pleasure or travel is the main purpose of the flight.

Secondary Impacts - A combination of indirect and induced impacts also referred to as the multiplier effect. All estimates of secondary impacts were produced through econometric modeling.

For this analysis, indirect impacts are quantified as those benefits that occur as a result of businesses supporting the industry being modeled.

Standard Industrial Classification (SIC) Code - An industry classification system used by the U.S. Office of Management and Budget (OMB) to classify industries by a four-digit code. This classification system is used to select industry multipliers in the IMPLAN Model.

Total Impacts - The sum of all direct and secondary impacts attributable to the airport or system of airports.

True Transient Flights - Flights performed by non-locally based aircraft which are assumed to have departed from an airport at least 150 miles away from the airport being examined. According to AOPA, it is estimated that 33 percent of itinerant arrivals at general aviation airports are typically true-transient operations.

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